



# **PRISM Compliance Management Vendor Rollout Series PRISM Vendor User Training**

# Agenda

1. Introduction
2. PRISM Overview
3. Accessing PRISMCompliance.com
4. PRISM Compliance Management
  - Prime & Sub Responsibilities
  - PRISM Acknowledgements
5. PRISM Labor Management
6. PRISM Workforce Management
7. PRISM Vendor Search
8. PRISM Administration
9. PRISM News & Events
10. PRISM Workshops
11. PRISM Resources

# 1.0

# Introduction

# PRISMCompliance.com

- The purpose of this class is to train vendors in the use of the **PRISMCompliance.com** portal
- We are using this portal to facilitate the collection, tracking, and reporting of diversity inclusion and outreach efforts

# 2.0

# PRISM Overview

### ***Objectives***

**Upon completion of this module, you should be able to:**

1. Describe the PRISM application
2. Describe the components of the PRISM Portal
3. Describe how it will assist with reporting

# ***The PRISM Solution for Vendors***

- PRISM Compliance Management
- PRISM Support Site
- Vendor Tutorials
- Jurisdiction help desk support
- Vendor-Based Services

### 2.1 Modules of PRISM application

# PRISMCompliance.com

PRISMCompliance.com offering . . .

#### ***Vendor Management***

- eDirectory
- Vendor Profile Management

#### ***Compliance Management***

- Prime and Sub Payment Transactions
- Proactive Compliance Notifications

#### ***Labor Management***

- Automatic Notification
- Web-based Certified Payroll Submission

#### ***Workforce Management***

- Workforce Utilization by various criteria including hours or individual participation

#### ***Outreach and Announcements***

- Vendor Webinars and Training
- Bulk eMail Capability
- Mailing Labels

#### ***Certification Management***

- Online Certification Application
- Automatic Notification of Recertification



## 2. PRISM Overview

### 2.2 PRISM Portal

The screenshot shows the PRISM Portal website in a web browser. The browser's address bar displays <https://stage.prismcompliance.com/default.aspx>. The website has a blue header with the PRISM logo and navigation links: Features, Support, Contact US, and FAQ. The main content area is divided into two columns. The left column contains a 'Visit A Jurisdiction?' section with a dropdown menu set to 'CRAA' and a 'go!' button, followed by a login section with 'User ID' and 'Password' fields, a 'go!' button, and a 'Forgot your password?' link. The right column features a large banner image with the text 'PRISM 2012 R1 is here!' and a detailed list of new features under the heading 'The first release of 2012 is here! Many Jurisdictional enhancement requests highlight the latest and greatest version of PRISM ever. Some of the more prominent features include:'. The list includes: 1. Key Word Search, 2. PRISM Fax, 3. Quick Vendor Add, 4. Preview Email, and 5. Warn if Not MBE. The footer of the page reads 'PrismCompliance.com © - 2004 an Early Morning Software Innovation'.

Annotations with arrows point to the following elements:

- 'Access to a searchable database of vendors' points to the 'Visit A Jurisdiction?' dropdown menu.
- 'Login to do your compliance reporting here' points to the 'Ligon here!' section.
- 'Forgot your Password? Click here and have it emailed to you.' points to the 'Forgot your password?' link.
- 'PRISM Support' points to the 'Support' navigation link.
- 'Latest Product News' points to the 'PRISM 2012 R1 is here!' banner and the list of features.

# **3.0**

# **Accessing**

# **PRISMCompliance.com**

## ***Objectives***

**Upon completion of this module, you should be able to:**

1. Access PRISMComcompliance.com
2. Change your password

# 3. Accessing PRISMCompliance.com

## 3.1 PRISM Portal – <http://pro.prismcompliance.com>

Your data is secure

Login here...

Forgot your password?

PRISM COMPLIANCE MANAGEMENT

Features Support Contact US FAQ

Visit A Jurisdiction?  
CRAA  
☐ Remember this jurisdiction  
go!

Or you can...

Login here!  
User ID:   
Password:   
go!

Forgot your password?

PRISM 2012 R1 is here!

The first release of 2012 is here! Many Jurisdictional enhancement requests highlight the latest and greatest version of PRISM ever. Some of the more prominent features include:

- 1. Key Word Search:** The Key Word Search has replaced the list all function in Vendor, Contract, Compliance, and Certification management. Now users will be able to type in Key Words and PRISM will search selected fields for matches.
- 2. PRISM Fax:** Vendors will now be able to fax documents (checklist items) through the certification module in PRISM when filling out certification applications.
- 3. Quick Vendor Add:** Have you ever been in the process of entering a contract only to find out that a vendor is not registered in PRISM? Previously you would have had to place the contract on hold, exit to vendor management, add the vendor manually and then continue with the contract. Now, with Quick Vendor Add, you can simply input a tax id and vendor name and continue along with the contract.
- 4. Preview Email:** Now when sending correspondence to vendors the email you are sending will be shown on the confirmation page instead of having to select preview. It's just another way PRISM is working to make your job less demanding.
- 5. Warn if Not MBE:** This is a proactive step that PRISM takes to ensure that users are aware if they are attempting to assign a diversity role to a vendor that no longer carries that certification.

PrismCompliance.com © - 2004  
an Early Morning Software Innovation



# 3. Accessing PRISMCompliance.com

## 3.2 The first time you log in

- You are **Required** to change your password
- Passwords must be at least eight (8) alphanumeric characters

https://stage.prismcompliance.com/default.aspx

File Edit View Favorites Tools Help

PRISM Stage Microsoft Outlook Web A... PRISM Pro Basecamp Web Slice Gallery Suggested Sites

**PRISM**  
COMPLIANCE MANAGEMENT

Features Support Contact US FAQ

Visit A Jurisdiction?  
BCPSS  
☐ Remember this jurisdiction  
**go!**

Or you can...

Change Password  
New Password:   
Confirm Password:   
**Submit** **Cancel**  
*The password is expired. Enter a new password.*

**PRISM 2012 R1 is here!**

The first release of 2012 is here! Many Jurisdictional enhancement requests highlight the latest and greatest version of PRISM ever. Some of the more prominent features include:

- 1. Key Word Search:** The Key Word Search has replaced the list all function in Vendor, Contract, Compliance, and Certification management. Now users will be able to type in Key Words and PRISM will search selected fields for matches.
- 2. PRISM Fax:** Vendors will now be able to fax documents (checklist items) through the certification module in PRISM when filling out certification applications.
- 3. Quick Vendor Add:** Have you ever been in the process of entering a contract only to find out that a vendor is not registered in PRISM? Previously you would have had to place the contract on hold, exit to vendor management, add the vendor manually and then continue with the contract. Now, with Quick Vendor Add, you can simply input a tax id and vendor name and continue along with the contract.
- 4. Preview Email:** Now when sending correspondence to vendors the email you are sending will be shown on the confirmation page instead of having to select preview. It's just another way PRISM is working to make your job less demanding.
- 5. Warn if Not MBE:** This is a proactive step that PRISM takes to ensure that users are aware if they are attempting to assign a diversity role to a vendor that no longer carries that certification.

PrismCompliance.com © - 2004  
an Early Morning Software Innovation

# **4.0 PRISM Compliance Management**

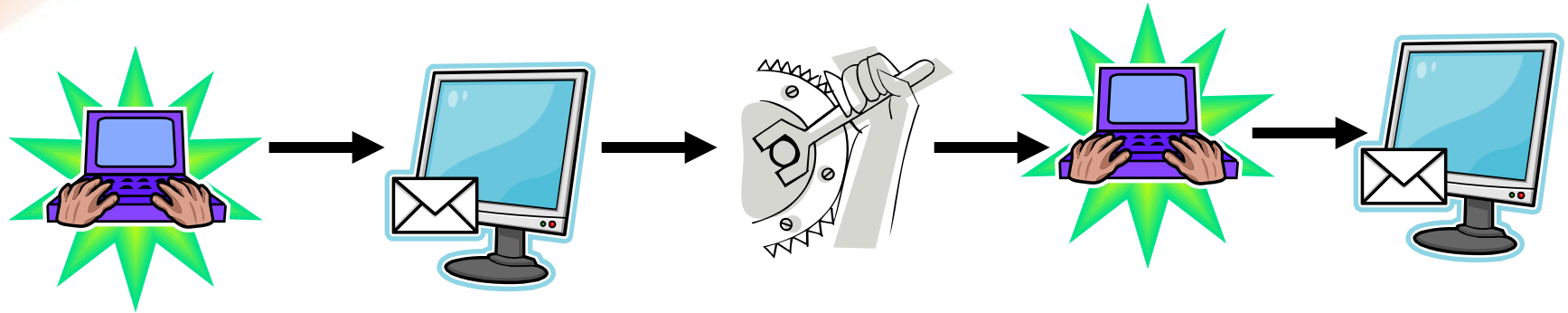
### ***Objectives***

**Upon completion of this module, you should be able to:**

1. Discuss the Compliance Management workflow
2. Understand the List and Search capabilities of PRISM to navigate the compliance database
3. Describe how the Prime and Subcontractor Payment /Invoice Reports are entered into PRISM
4. Understand where to find a list of payments/invoices associated with a contract
5. Describe the acknowledgements sent from PRISM for Payment Reports

# 4. PRISM Compliance Management

## 4.1 Compliance Workflow



Contract and Sub Contract participation Plan is entered into the system by your Jurisdiction

Prime and Subcontractor are sent a contract acknowledgement email. This is optional and may vary by jurisdiction.

Prime and Subcontractor begin work

Primes enters invoice and payment reports into PRISM

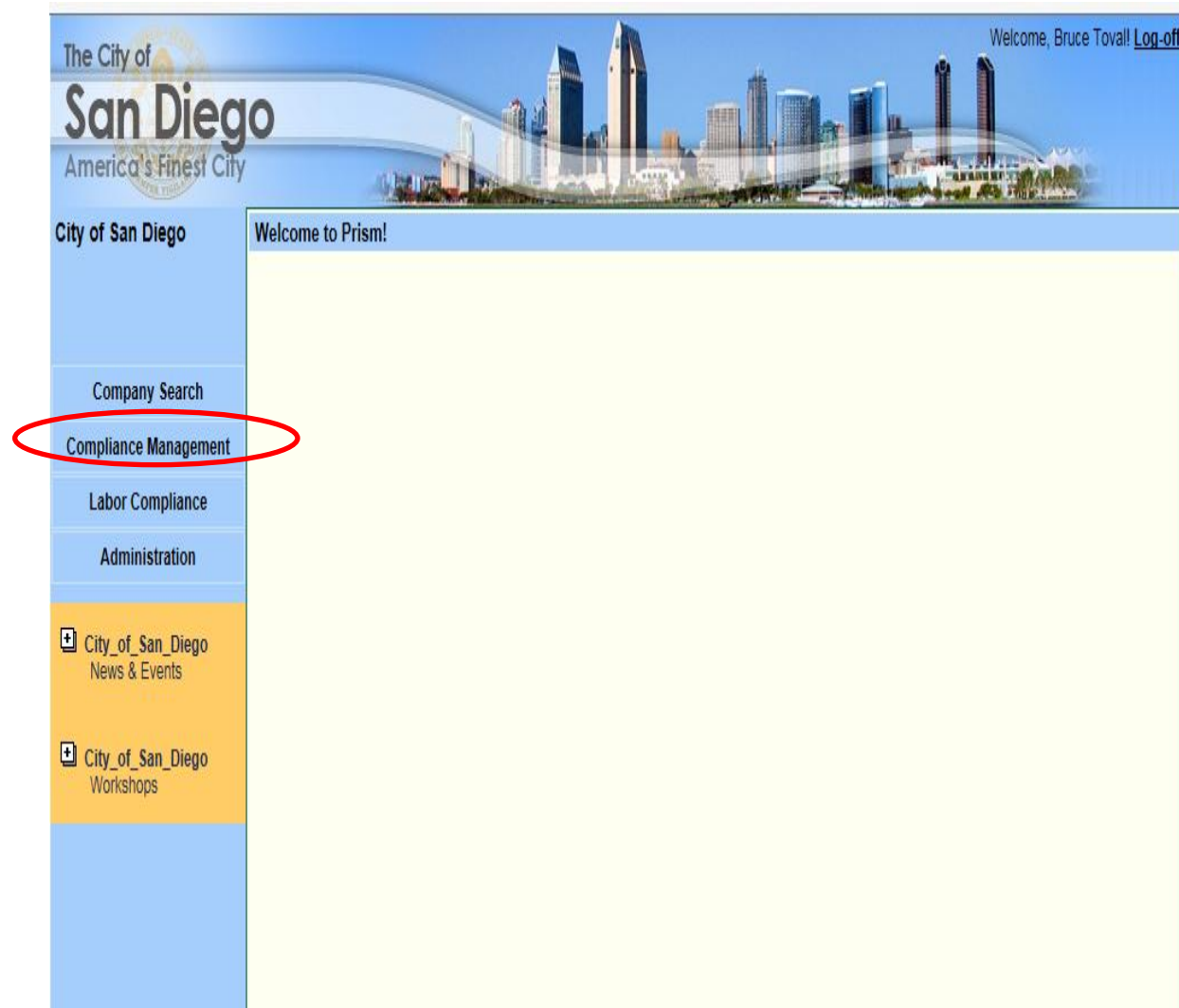
Email Acknowledgement is sent from PRISM to the sub for verification of payments from prime



# 4. PRISM Compliance Management

## 4.2 Vendor View after logging in

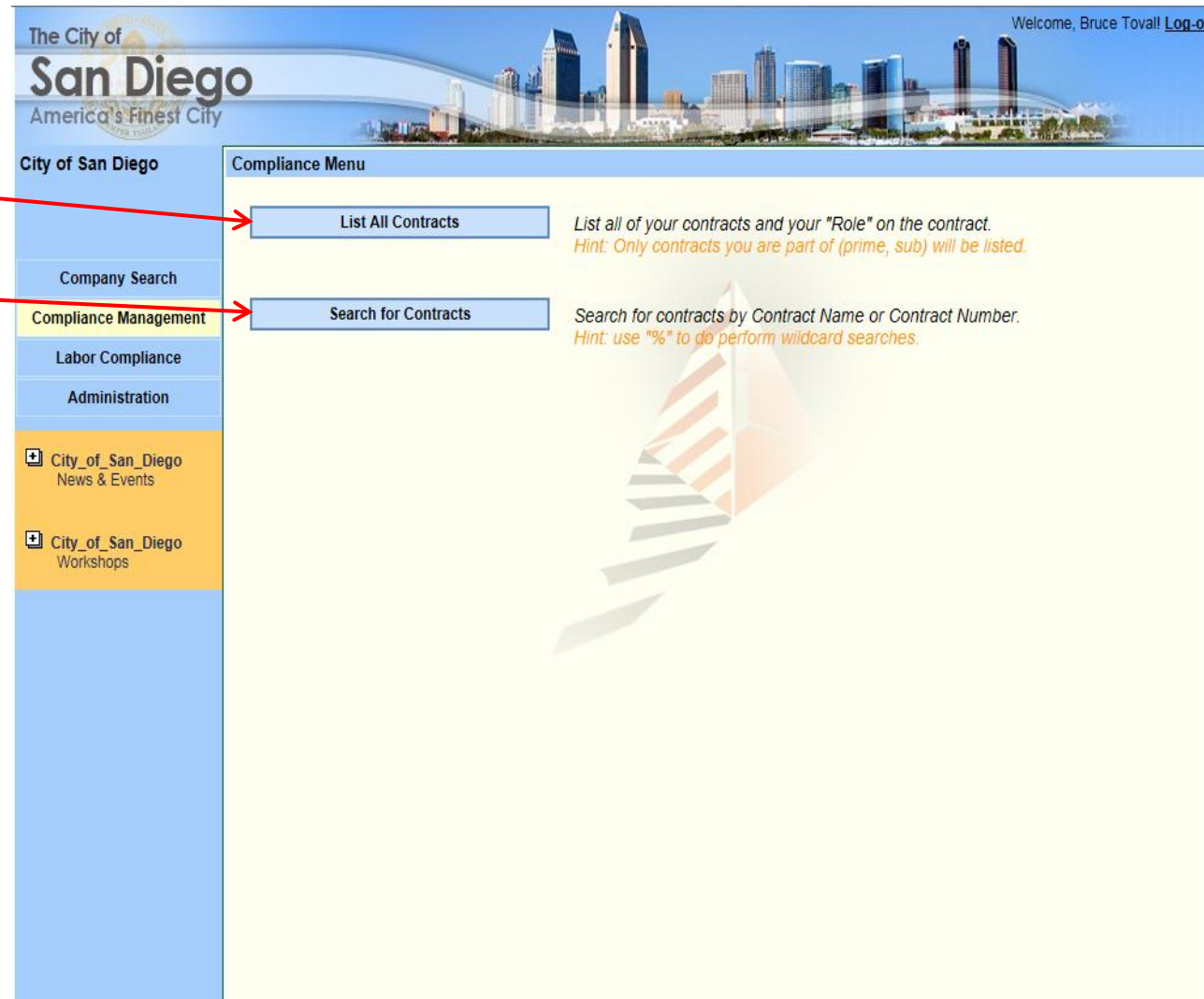
- *Select* Compliance Management



# 4. PRISM Compliance Management

## 4.3 Compliance Management Module

- List all Contracts that you (Vendor) are participating on
- Search all Contracts that you are participating on



The screenshot displays the PRISM Compliance Management interface for the City of San Diego. The header includes the City of San Diego logo and a welcome message for Bruce Tovall. The sidebar on the left contains navigation links: City of San Diego, Company Search, Compliance Management (highlighted), Labor Compliance, and Administration. Below these are expandable sections for City\_of\_San\_Diego News & Events and City\_of\_San\_Diego Workshops. The main content area features a 'Compliance Menu' with two options: 'List All Contracts' and 'Search for Contracts'. Each option has a descriptive text and a hint.

**City of San Diego**  
America's Finest City

Welcome, Bruce Tovall! [Log out](#)

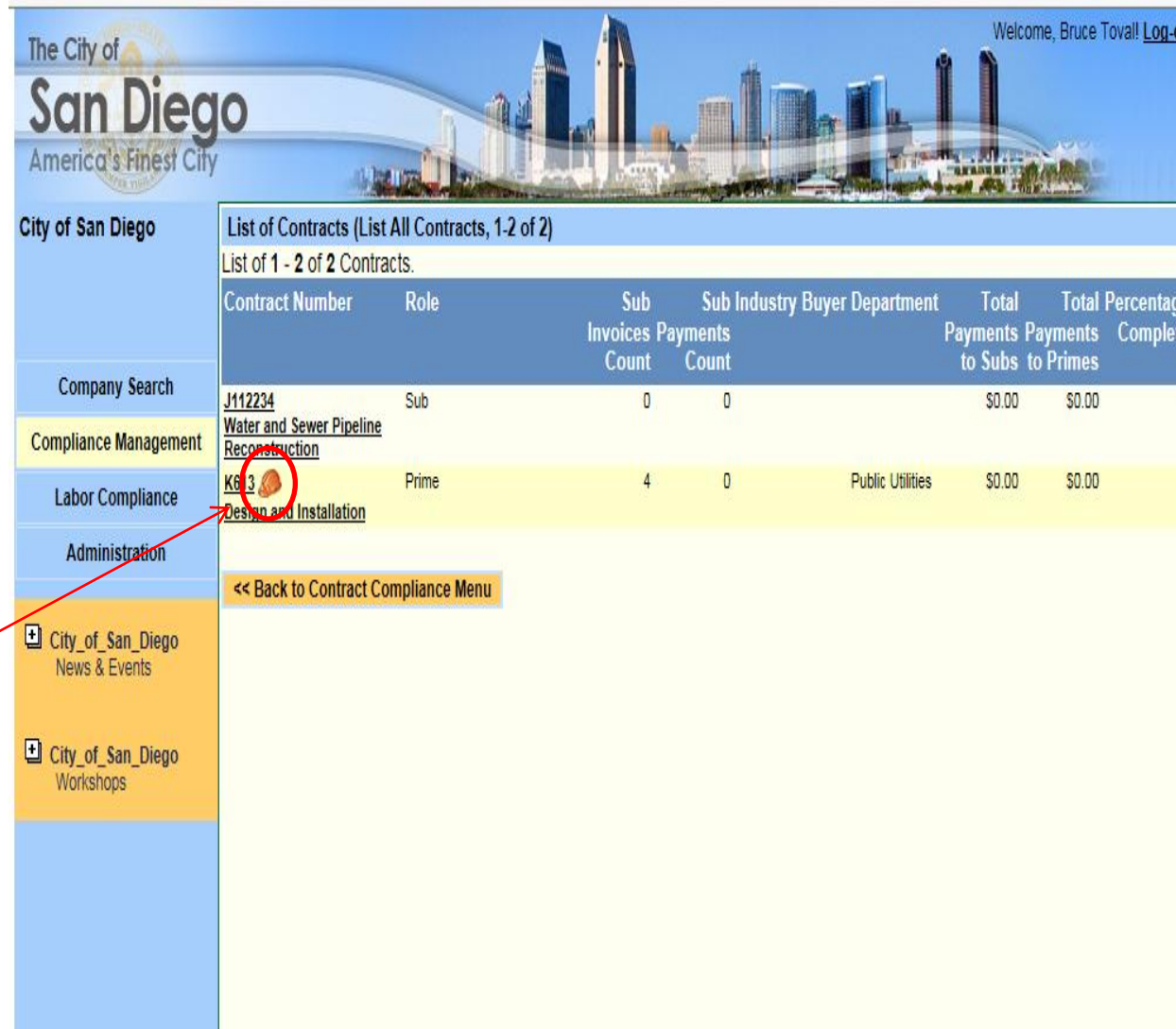
**Compliance Menu**

- List All Contracts**  
List all of your contracts and your "Role" on the contract.  
Hint: Only contracts you are part of (prime, sub) will be listed.
- Search for Contracts**  
Search for contracts by Contract Name or Contract Number.  
Hint: use "%" to do perform wildcard searches.

# 4. PRISM Compliance Management

## 4.4 Listing Contracts Awarded

- **Select** List All Contracts
- Shows:
  - Contract Number
  - Contract Name
  - Role (Prime or Sub)
  - \*Industry
  - \*Buyer Name
  - \*Departments
  - \*Denotes that the field is optional
- Hard Hat Indicates payroll requirement
- All columns may be sorted by selecting the column header



The City of San Diego  
America's Finest City

Welcome, Bruce Tovall! [Log Out](#)

City of San Diego

List of Contracts (List All Contracts, 1-2 of 2)

List of 1 - 2 of 2 Contracts.

Contract Number	Role	Sub Invoices Count	Sub Payments Count	Sub Industry	Buyer Department	Total Payments to Subs	Total Payments to Primes	Percentage Complete
J112234	Sub	0	0			\$0.00	\$0.00	
<u>Water and Sewer Pipeline Reconstruction</u>								
K683	Prime	4	0		Public Utilities	\$0.00	\$0.00	
<u>Design and Installation</u>								

<< Back to Contract Compliance Menu

City of San Diego  
News & Events

City of San Diego  
Workshops

# 4. PRISM Compliance Management

## 4.5 Searching for Contracts Awarded to You

- **Select** Search For Contracts

- **Select one of the following criteria:**

**Contract Number**

**Contract Name**

**Award Amount**

**Custom Fields**

**Department**

**Industry**

**Jurisdictional Payment Amt.**

**Jurisdictional Payment Date**

**Prime Payment Amt**

**Prime Payment Date**

- **Select “Search”**

The screenshot shows the 'Search for Contracts' page of the City of San Diego's PRISM system. The header includes the City of San Diego logo and a welcome message for Bruce Tovall. A sidebar on the left contains navigation links: Company Search, Compliance Management (highlighted), Labor Compliance, and Administration. Below these are links for 'City of San Diego News & Events' and 'City of San Diego Workshops'. The main content area has a search bar with a placeholder text 'Select a search criteria below and click "Search"'. Below the search bar is a paragraph explaining the search process. A 'Simple Search' tab is active, showing a three-step process: Step 1: Find Contracts whose: (with a dropdown menu open showing options like Award Amount, Contract Name, etc.), Step 2: is similar to: (with a dropdown menu open showing options like Jurisdictional Payment Amount, etc.), and Step 3: Search (with a yellow 'Search' button). A yellow button at the bottom left of the search area says '<< Back to Contract Compliance Menu'.

Hint: Enter “%” sign in front of the search criteria to show all.



# 4. PRISM Compliance Management

## 4.6 Reporting Activity to a Contract

- If you are the **Prime**, then you will be reporting **payments to the Subcontractors**. **AND** Payments received from the City of San Diego
- If you are the **Subcontractor**, then you will be **verifying payments sent from the Prime**.



# 4. PRISM Compliance Management

## 4.7 Adding a Prime Payment Report (Payee to subordinate for N-tier)

- Prime Contractor Report of a Payment to a subcontractor
- Complete the fields
  - Sub (select from list)
  - Invoice number
  - Invoice Amount
  - Amount Paid
  - Reference (if previously used inv. Number)
  - Date Sent
  - Indicates no payment activity
- Click 'Add Payment'

The City of San Diego  
America's Finest City

Welcome, Bruce Tovall [Log-off](#)

City of San Diego

List of Contracts >> Payment Menu >> Adding Payments

Contract Number: **K613** Contract Name: **Design and Installation**

[Add/Update](#)

**Payment Info** **Custom Fields**

Direct Report\*: **City Contractors** Sub\*: **Construction Kings (SLBE)**

Invoice Number\*: **22 - 12/01/2014, \$0.00 of \$16,000.00 total paid**

Invoice Amount\*: **16000** Amount Paid\*: **16000**

Reference #:  Date Sent\*: **05/10/2015**

Comments:

[Add Payment](#) [Close](#)

☐ No reporting activity ☐ This sub ☐ All my subs

**Vendor Payments**

[Add Payment](#)

Contractors	Invoice #	Invoice Amount	Amount Paid	Sent Date	Reference #	Status	Ref.	Edit	Delete
Direct Report: City Contractors Sub: Construction Kings (SLBE)	12	\$14,000.00	\$14,000.00	05/10/2015		Not Responded		<a href="#">Edit</a>	<a href="#">Delete</a>

[<< Back to Compliance Activity Menu](#)

# 4. PRISM Compliance Management

## 4.7 Adding a Prime Payment Report (Uploading Verification)

- From List of Previous payments select the 'REF' paperclip icon
- Select 'Browse' to upload Document

The City of San Diego  
America's Finest City

City of San Diego

Company Search  
Compliance Management  
Labor Compliance  
Administration  
City\_of\_San\_Diego News & Events  
City\_of\_San\_Diego Workshops

Contract Number: K613 Contract Name: Design and Installation

Add/Update

Payment Info Custom Fields

Direct Report \*: City Contractors Sub \*: Construction Kings (SLBE)

Invoice Number: 22 - 12/01/2014, \$0.00 of \$16,000.00 total paid

Invoice Amount \*: 16000 Amount Paid \*: 16000

Reference #: Date Sent \*: 05/10/2015

Comments:

Add Payment Close

No reporting activity ☐ This sub ☐ All my subs

Vendor Payments

Contractors	Invoice #	Invoice Amount	Amount Paid	Sent Date	Reference	Status	Ref.	Edit	Delete
Direct Report: City Contractors Sub: Construction Kings (SLBE)	12	\$14,000.00	\$14,000.00	05/10/2015		Not Responded			

<< Back to Compliance Activity Menu

The City of San Diego  
America's Finest City

City of San Diego

Company Search  
Compliance Management  
Labor Compliance  
Administration  
City\_of\_San\_Diego News & Events  
City\_of\_San\_Diego Workshops

List of References Assigned to Payment Report "K613" Prime: City Contractors, Sub: Construction Kings

Name	Description	User	Date Added	Reference Type	Status	Notes	View	Delete
------	-------------	------	------------	----------------	--------	-------	------	--------

Add Reference

Reference Name: \*

Description:

File: \* Browse...

You are currently using 0 MB (0%) of your 300 MB.

Comment:

Add Reference

<< Back to Payment Report List

# 4. PRISM Compliance Management

## 4.8 Add a Jurisdictional Payment Report

- Enter the following:  
PO Number  
Amount  
Payment Date  
Issue Date  
Reference (check#)
- Select** 'Add Payment'

The City of San Diego  
America's Finest City

Welcome, Bruce Iovall

City of San Diego

Company Search  
Compliance Management  
Labor Compliance  
Administration

+ City\_of\_San\_Diego News & Events  
+ City\_of\_San\_Diego Workshops

List of Contracts >> Payment Menu >> Jurisdictional Payments Adding

Here is a list of all prime payments made on this contract. To add a new payment, click the **Add New Payment** button. To edit or delete a payment, click the **Edit** or **Delete** links on the appropriate row.

Contract Number: **K613** Contract Name: **Design and Installation**

**Add/Update**

**Payment Info** **Industry** **Custom Fields**

Prime \*: **City Contractors** PO Number \*:  Payment Date \*:   
Reference #:  Payment Amount \*:  Issue Date \*:   
Excluded from Goals? ☐  
**Add Payment** **Cancel**

**Jurisdictional Payments**

**Add New Payment**

Prime Contractor	PO #	Payment Amount	Payment Date	Issue Reference #	Edit Delete
City Contractors	inv-328	\$328,000.00	10/05/2014	12/04/2014	<a href="#">Edit</a> <a href="#">Delete</a>

**<< Back to Compliance Activity Menu**



# 4. PRISM Compliance Management

## 4.9 Listing Subcontractor Invoice Reports

- List all Invoice Reports submitted by Primes
- Confirm Payment by clicking link

The City of San Diego  
America's Finest City

Welcome, Unknown Unknown! [Log-off](#)

City of San Diego

List of Contracts >> Payment Menu >> List of Sub Invoices

Contract Number: K613 Contract Name: Design and Installation

Subcontractor Invoices for Contract Number: K613

Prime	Sub	Invoice #	Invoice Issue Date	Invoice Sent Date	Invoice Due Date	Invoice Amount	Payment Date	Amount Paid	Amount Received	Status	Ref.	Delete
City Contractors Kings	Construction 12		11/01/2014	11/01/2014	12/01/2014	\$14,000.00	05/10/2015	\$14,000.00	\$0.00	Not Responded		
City Contractors Kings	Construction 2		10/01/2014	10/01/2014	11/01/2014	\$17,000.00						
City Contractors Kings	Construction 22		12/01/2014	12/01/2014	01/01/2015	\$16,000.00						
City Contractors Kings	Construction 32		02/01/2015	02/01/2015	03/01/2015	\$28,000.00						

<< Back to Compliance Activity Menu

City of San Diego  
City of San Diego News & Events  
City of San Diego Workshops

# 4. PRISM Compliance Management

## 4.10 List Prime Payment Reports

- List all Payment Reports made **by** Prime
- List will show subs '*Amount Received*' **AND** "*Acceptance Status*"

The screenshot displays the PRISM Compliance Management interface for the City of San Diego. The header features the city's logo and a skyline image. The left sidebar contains navigation links: Company Search, Compliance Management (selected), Labor Compliance, and Administration. Below these are links for City of San Diego News & Events and City of San Diego Workshops. The main content area shows the breadcrumb path: List of Contracts >> Payment Menu >> List of Prime Invoices. It displays the Contract Number K613 and Contract Name Design and Installation. A red banner indicates Prime Invoice Payments to Subcontractors for Contract Number: K613. A table lists the invoice details:

Prime	Sub	Invoice #	Invoice Amount	Amount Paid	Amount Received	Sent Date	Status	Ref.	Delete
City Contractors	Construction Kings	12	\$14,000.00	\$14,000.00	\$0.00	05/10/2015	Not Responded		

A button labeled << Back to Compliance Activity Menu is located at the bottom of the main content area.

# 4. PRISM Compliance Management

## 4.11 Payment Acknowledgement

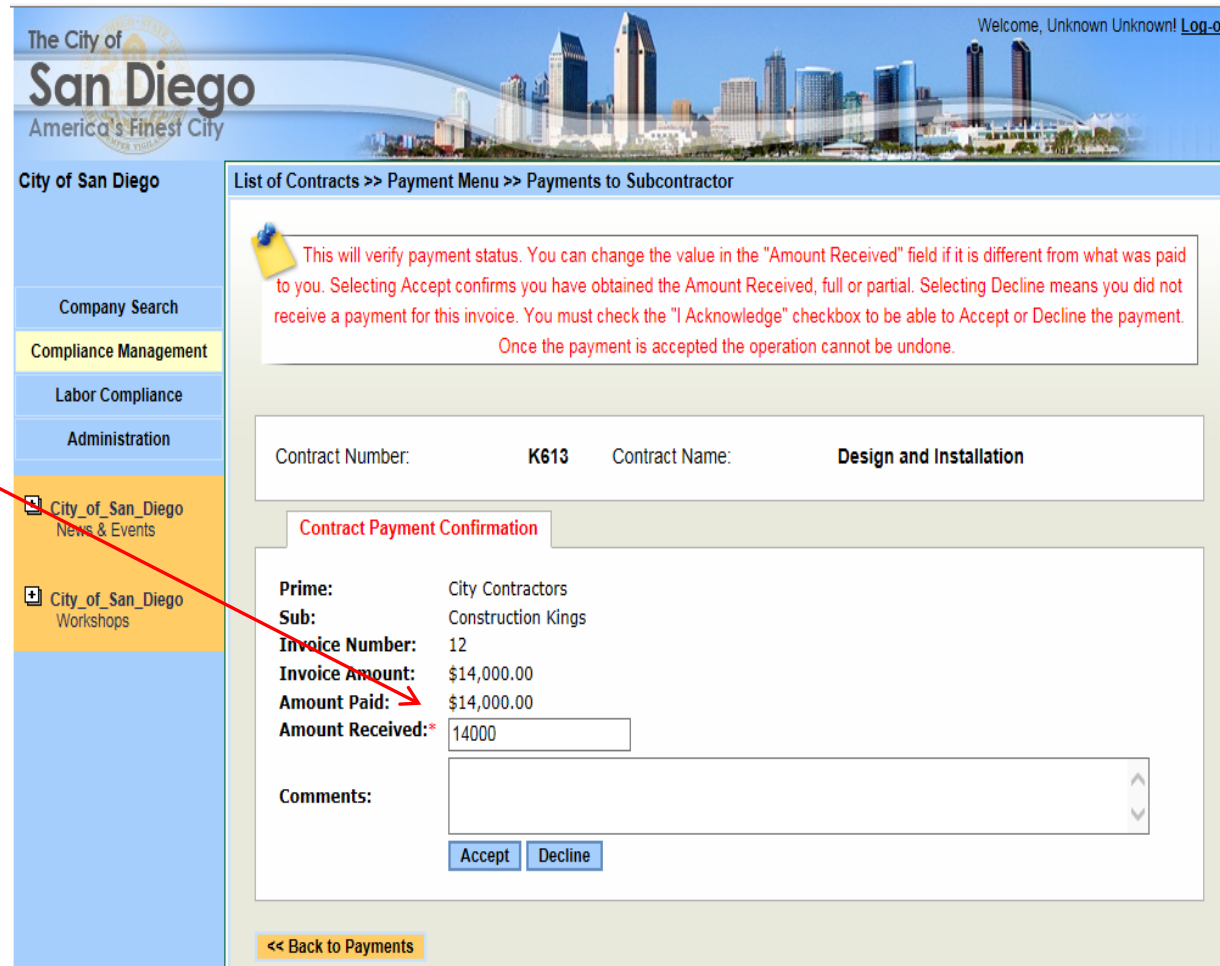
- Email to subs with option to validate payment
- Payment Status Indicator
  - Accept
  - Not Accept
  - Payment Discrepancy

Prism Compliance Payment Acknowledgement	
Prime Name:	City Contractors
Contract Number:	K613
Contract Name:	Design and Installation
Invoice Number:	12
Invoice Amount:	\$32,000.00
<p>The City of San Diego's Equal Opportunity Contracting Program (EOCP) is responsible for verification of subcontractor utilization and the prime contractor's compliance with prompt payment to listed subcontractors and suppliers. According to our records, your firm is listed as a subcontractor, vendor or supplier for the above listed project.</p> <p>A prompt response is imperative for accurate verification of the amount paid to your company, as well as any amounts shown.</p> <p>Your cooperation is requested in reviewing the instructions and completing the appropriate information listed below.</p> <p>Thank you.</p> <p>Purchasing &amp; Contracting Department Equal Opportunity Contracting Program</p> <p>If you have received the amount of \$32,000.00 you may click here to <a href="#">Acknowledge Receipt</a>. (Note the payment may take a few days to reach you.)</p> <p>If you have received a payment for invoice 12 and it is not the amount of \$32,000.00, please <a href="#">log into PRISM</a> and report the amount you received.</p> <p>If you have waited for the payment to invoice 12 and have not received any amount, then <a href="#">please click here to indicate you have not received the payment</a>.</p>	

# 4. PRISM Compliance Management

## 4.12 Payment Acknowledgement

- Verifying through User Interface
- If you did not receive the amount indicated by the prime, enter your actual amount received



The City of San Diego  
America's Finest City

City of San Diego

Company Search  
Compliance Management  
Labor Compliance  
Administration  
City\_of\_San\_Diego News & Events  
City\_of\_San\_Diego Workshops

Welcome, Unknown Unknown! [Log-out](#)

List of Contracts >> Payment Menu >> Payments to Subcontractor

This will verify payment status. You can change the value in the "Amount Received" field if it is different from what was paid to you. Selecting Accept confirms you have obtained the Amount Received, full or partial. Selecting Decline means you did not receive a payment for this invoice. You must check the "I Acknowledge" checkbox to be able to Accept or Decline the payment. Once the payment is accepted the operation cannot be undone.

Contract Number: **K613** Contract Name: **Design and Installation**

**Contract Payment Confirmation**

Prime: City Contractors  
Sub: Construction Kings  
Invoice Number: 12  
Invoice Amount: \$14,000.00  
Amount Paid: \$14,000.00  
Amount Received: 14000

Comments:

[<< Back to Payments](#)

# **5.0**

# **PRISM Labor Management**



# 5. PRISM Labor Management

## 5.1 Labor Management Workflow

The following steps details the Labor Management Module Workflow.

- [Manage Employee Profiles](#) (As Needed)- This is done once for each employee and then revisited as needed. Here you will identify all demographics related to the employee including: ethnicity, gender, address, new hire status, etc.
- [Assign Employee Classifications](#) (per contract) – Your jurisdiction has already determined what wage decisions will be used on a contract. All you need to do is assign the selected classifications to your employees. Subsequently, only those classifications can be used to report payroll. This process is done for every contract(if necessary).
- [Adding payrolls \(per payroll\)](#) – The step involves entering the payroll data for a particular contract and a particular vendor. Each employee is entered separately using the same screens. PRISM can also import the payroll information from an external file. Vendors can enter this information via the web or a jurisdiction can enter the information on behalf of a vendor.
- [Certifying payrolls \(per payroll\)](#) – This step involves a jurisdiction or a vendor approving a payroll as an official submission. This can be performed when the payroll information is entered or at a later time. An implicit audit is performed with every Certify payroll request.

# 5. PRISM Labor Management

## 5.2 Labor Management

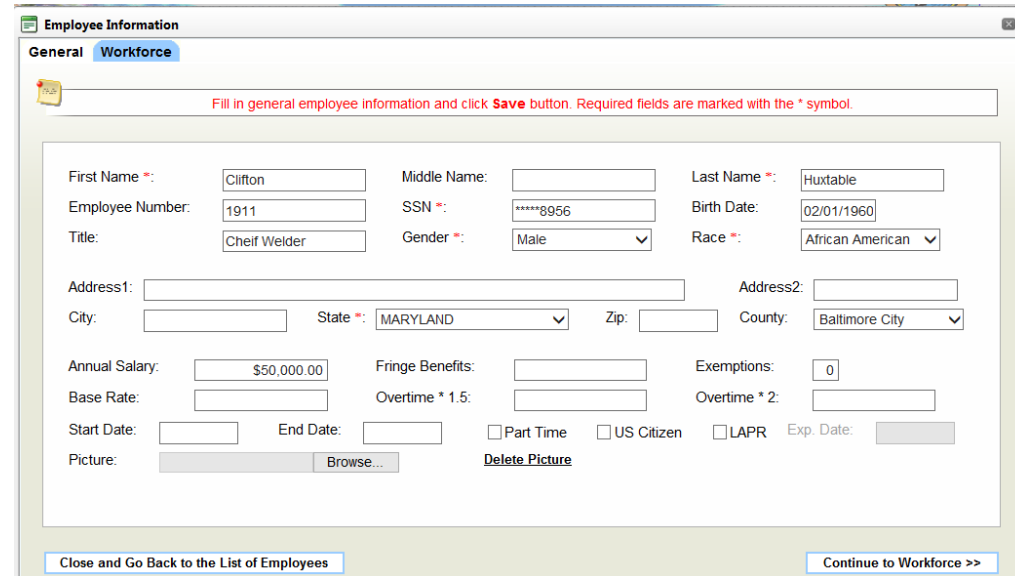
- The Labor Management Module facilitates the entry and certification of your payrolls
- PRISM allows you to enter, and certify payrolls over the web. Jurisdictions can enter, view, audit, and certify the payrolls as well



# 5. PRISM Labor Management

## 5.3 Labor Management – Employee Manager

- The Employee Manager stores information about your employees that facilitate completing payroll wizards and workforce reports.

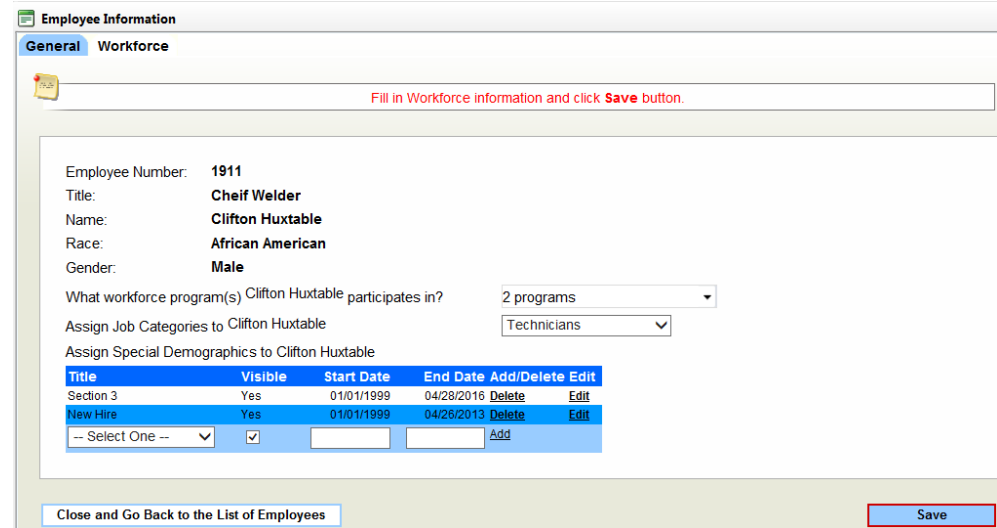


Employee Information

General Workforce

Fill in general employee information and click **Save** button. Required fields are marked with the \* symbol.

First Name \*: Clifton Middle Name: Last Name \*: Huxtable  
Employee Number: 1911 SSN \*: \*\*\*\*\*8956 Birth Date: 02/01/1960  
Title: Chief Welder Gender \*: Male Race \*: African American  
Address1: Address2:  
City: State \*: MARYLAND Zip: County: Baltimore City  
Annual Salary: \$50,000.00 Fringe Benefits: Exemptions: 0  
Base Rate: Overtime \* 1.5: Overtime \* 2:  
Start Date: End Date: ☐ Part Time ☐ US Citizen ☐ LAPR Exp. Date:  
Picture:  [Delete Picture](#)



Employee Information

General Workforce

Fill in Workforce information and click **Save** button.

Employee Number: 1911  
Title: Chief Welder  
Name: Clifton Huxtable  
Race: African American  
Gender: Male  
What workforce program(s) Clifton Huxtable participates in? 2 programs  
Assign Job Categories to Clifton Huxtable Technicians  
Assign Special Demographics to Clifton Huxtable

Title	Visible	Start Date	End Date	Add/Delete	Edit
Section 3	Yes	01/01/1999	04/28/2016	<a href="#">Delete</a>	<a href="#">Edit</a>
New Hire	Yes	01/01/1999	04/26/2013	<a href="#">Delete</a>	<a href="#">Edit</a>
-- Select One --	<input checked="" type="checkbox"/>			<a href="#">Add</a>	



# 5. PRISM Labor Management

## 5.4 Labor Management – Assign Classifications

Filter classifications  
by WD number,  
Issuer, Craft, location,  
etc.

Select an employee  
from list

Select classifications  
from list by checking

View Description of  
WD

Click 'Assign' to assign  
the employee to the  
classification

List of classification  
assigned to an  
employee

The City of San Diego  
America's Finest City

Welcome, Bruce Tovall!

City of San Diego

Classification Assigning

Classification Assignment

Issuer: DOL State: CALIFORNIA Location: -- Select One --  
WD Number: ELEC0569-001 Modification: -- Select One -- Year: -- Select One --  
Craft: -- Select One --

Select Employee

Nedab Lamar ...9999  
Cotto Luis ...4444

Select Classifications

Craft	Level	Type	Wage Decision	Location	Rate	Cust.	Descr.
<input type="checkbox"/> ELECTRICIANS (TUNNEL WORK)	JOURNEYMAN	Highway	ELEC0569-001 - 1 - 02/12/2010 Issuer - DOL	San Diego	\$41.98	No	<a href="#">View</a>
<input type="checkbox"/> ELECTRICIANS (TUNNEL WORK)	JOURNEYMAN	Heavy	ELEC0569-001 - 1 - 02/12/2010 Issuer - DOL	San Diego	\$41.98	No	<a href="#">View</a>
<input type="checkbox"/> ELECTRICIANS (TUNNEL WORK)	JOURNEYMAN	Building	ELEC0569-001 - 1 - 02/12/2010 Issuer - DOL	San Diego	\$41.98	No	<a href="#">View</a>
<input type="checkbox"/> ELECTRICIANS (TUNNEL WORK)	JOURNEYMAN	Highway	ELEC0569-001 - 1 - 02/12/2010 Issuer - DOL	San Diego	\$41.23	No	<a href="#">View</a>
<input type="checkbox"/> ELECTRICIANS (TUNNEL WORK)	JOURNEYMAN	Heavy	ELEC0569-001 - 1 - 02/12/2010 Issuer - DOL	San Diego	\$41.23	No	<a href="#">View</a>
<input type="checkbox"/> ELECTRICIANS (TUNNEL WORK)	JOURNEYMAN	Building	ELEC0569-001 - 1 - 02/12/2010 Issuer - DOL	San Diego	\$41.23	No	<a href="#">View</a>
<input type="checkbox"/> ELECTRICIANS	JOURNEYMAN	Highway	ELEC0569-001 - 1 - 02/12/2010 Issuer - DOL	San Diego	\$37.40	No	<a href="#">View</a>
<input type="checkbox"/> ELECTRICIANS	JOURNEYMAN	Heavy	ELEC0569-001 - 1 - 02/12/2010 Issuer - DOL	San Diego	\$37.40	No	<a href="#">View</a>
<input type="checkbox"/> ELECTRICIANS	JOURNEYMAN	Building	ELEC0569-001 - 1 - 02/12/2010 Issuer - DOL	San Diego	\$37.40	No	<a href="#">View</a>
<input type="checkbox"/> ELECTRICIANS	JOURNEYMAN	Highway	ELEC0569-001 - 1 - 02/12/2010 Issuer - DOL	San Diego	\$36.65	No	<a href="#">View</a>
<input type="checkbox"/> ELECTRICIANS	JOURNEYMAN	Heavy	ELEC0569-001 - 1 - 02/12/2010 Issuer - DOL	San Diego	\$36.65	No	<a href="#">View</a>
<input type="checkbox"/> ELECTRICIANS	JOURNEYMAN	Building	ELEC0569-001 - 1 - 02/12/2010 Issuer - DOL	San Diego	\$36.65	No	<a href="#">View</a>

Assign

List of Assigned Classifications

Name	SSN	Location	Construction Type	Craft	Level	Rate	Custom	Delete
Lamar Nedab	*****9999	San Diego	Building	DRYWALL FINISHER	APPRENTICE	\$10.90	No	
Luis Cotto	*****4444	San Diego	Building	LABORER BUILDING CONSTRUCTION	JOURNEYMAN	\$26.97	No	

# 5. PRISM Labor Management

## 5.5 Labor Management – Add Payroll Wizard



Select 'Payroll Management'



Next, Choose 'Add a Payroll'

# 5. PRISM Labor Management

## 5.5 Labor Management – Add Payroll Wizard

The City of San Diego  
America's Finest City

Welcome, Bruce Tovall [Log-off](#)

City of San Diego

Payroll Menu

Payroll Information Employee Information Pay Information Deductions Information Confirm

Fill out the Project and Payroll details below then press the "Continue to Employee Info" button before moving on.

Project and Payroll Information

Select the Project:\*

Design and Installation

May 2015

S	M	T	W	T	F	S
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Select the Payroll End Date:\*

(Note: If Pay# appears in the calendar, it represents an existing payroll end date)

Enter Payroll Number:\*

1 [Suggest Payroll Number](#)

[This is a Non-Performance Payroll](#)

[Continue to Employee Info >>](#)

[Back to Payroll Menu <<](#)

Select a project, payroll end date, and payroll number OR select 'Non Performance Payroll'

The City of San Diego  
America's Finest City

Welcome, Bruce Tovall [Log-off](#)

City of San Diego

Payroll Menu

Payroll Information Employee Information Pay Information Deductions Information Confirm

Fill out the Employee and Classification details below then press the "Continue to enter Pay" button before moving on.

Employee and Classification Information

Project Number-Name: Design and Installation

Payroll End date: 05/02/2015

Payroll Number: 1

Select an employee: Cotto, Luis (\*\*\*\*4444) [Add/Edit Employees ...](#)

Please select the classification:

Construction Type	Craft	Location	Rate	Time Frame
<input type="radio"/> Building	LABORER BUILDING CONSTRUCTION	San Diego	\$26.97	01/01/1900-01/01/2099
<input checked="" type="radio"/> Heavy	CARPENTER	San Diego	\$32.30	01/01/1900-01/01/2099

[Continue to Pay Info >>](#)

[Back to Payroll Info <<](#)

Select employee and craft(s) worked for the week

# 5. PRISM Labor Management

## 5.5 Labor Management – Add Payroll Wizard

The screenshot shows the 'Add Payroll Wizard' in the PRISM Labor Management system. The left sidebar contains navigation links: Compliance Management, Labor Compliance, Administration, City\_of\_San\_Diego News & Events, and City\_of\_San\_Diego Workshops. The main content area has two tabs: 'General Information' and 'Payment Information'. The 'General Information' tab displays project details: Project Number-Name: Design and Installation, Payroll End Date: 05/02/2015, Payroll Number: 1, and Employee: Luis Cotto (\*\*\*\*4444). The 'Payment Information' tab is active, showing a table of rates. A red arrow points from the 'Indicate rates of Pay (Base, OT and Fringe) as well as hours worked for the week' instruction to the 'Total Project Pay' field.

Prevailing Wage		Actual Wage	
WD#:		Base Rate:	\$0.00 /hour
Craft: CARPENTER		Overtime Rate 1:	\$0.00 /hour
		Overtime Rate 2:	\$0.00 /hour
PW Rate:	N/A	Fringes:	
Overtime 1:	N/A	Health & Welfare:	\$0.00 /hour
Overtime 2:	N/A	Pension:	\$0.00 /hour
		Vacation/Holiday:	\$0.00 /hour
Fringes:		Training:	\$0.00 /hour
Health & Welfare:	N/A	Cash:	\$0.00 /hour
Pension:	N/A	Other:	\$0.00 /hour
Vacation/Holiday:	N/A	Total Fringe (old):	\$0.00 /hour
Training:	N/A		
Other:	N/A	Autosum Total Fringe:	\$0.00 /hour
Total Fringe:	N/A	Total Hourly Rate:	\$0.00 /hour
Total Hourly Rate:	N/A		

Total Gross Pay: \$0.00 Total Net Pay: \$0.00 Check Number/Pay ID:

Enter Hours Worked each day

	Sunday 04/26	Monday 04/27	Tuesday 04/28	Wednesday 04/29	Thursday 04/30	Friday 05/01	Saturday 05/02	Total
Regular Time	0	0	0	0	0	0	0	0
Overtime 1	0	0	0	0	0	0	0	0
Overtime 2	0	0	0	0	0	0	0	0
Fill in with Regular Time Calculate Project Pay								0
Total Project Pay:								\$0.00

Indicate rates of Pay (Base, OT and Fringe) as well as hours worked for the week (Standard and Overtime)

The screenshot shows the 'Deduction Information' tab of the 'Add Payroll Wizard'. The left sidebar is the same as the previous screenshot. The main content area has tabs: Payroll Menu, Payroll Information, Employee Information, Pay Information, Deductions Information, and Confirm. The 'Deductions Information' tab is active, displaying a list of deductions with input fields for amounts. A red arrow points from the 'Input all employee deductions' instruction to the 'Total Deductions (old)' field.

Fill out the Deduction details below then press the "Confirm & Save" button before moving on.

General Information

Project Number-Name: Design and Installation  
Payroll End Date: 05/02/2015  
Payroll Number: 1  
Employee: Luis Cotto (\*\*\*\*4444)

Deduction Info

Exemptions: 0

Federal Taxes: \$0.00  
FICA: \$0.00  
State Tax: \$0.00  
Local Tax: \$0.00  
SDI: \$0.00  
With-Holding: \$0.00  
Other Taxes: \$0.00

Union Dues: \$0.00  
Savings: \$0.00  
Medicare: \$0.00  
Trav/Subs: \$0.00  
Other Deductions: \$0.00

Total Deductions (old): \$0.00

Autosum Total Deductions: \$0.00

Notes: (2000 char)

Input all employee deductions

# 5. PRISM Labor Management

## 5.7 Labor Management – Add Payroll Wizard

- Review the confirmation and click 'Confirm & Save'
- If there is another employee on this payroll Click 'New Employee'

<b>Total Overtime 1:</b>		0h	<b>Overtime 1:</b>	\$0.00
<b>Total Overtime 2:</b>		0h	<b>Overtime 2:</b>	\$0.00
			<b>Health &amp; Welfare:</b>	\$0.00
			<b>Pension:</b>	\$0.00
			<b>Vacation/Holiday:</b>	\$0.00
			<b>Training:</b>	\$0.00
			<b>Cash:</b>	\$0.00
			<b>Other Fringes:</b>	\$0.00
			<b>Autosum Total Fringe:</b>	\$0.00
			<b>Total Hourly Rate:</b>	\$0.00
<b>Deductions</b>				
<b>Exemptions:</b>		0		
<b>Federal Taxes:</b>		\$0.00	<b>Union Dues:</b>	\$0.00
<b>State Taxes:</b>		\$0.00	<b>With-Holding:</b>	\$0.00
<b>Local Tax:</b>		\$0.00	<b>SDI:</b>	\$0.00
<b>Other Taxes:</b>		\$0.00	<b>Savings:</b>	\$0.00
<b>FICA:</b>		\$0.00	<b>Medicare:</b>	\$0.00
			<b>Trav/Subs:</b>	\$0.00
<b>Total Deductions (old):</b>		\$0.00	<b>Other Deductions:</b>	\$0.00
<b>Autosum Total Deductions:</b>		\$0.00		
<b>Notes:</b>				
<b>Fringe Benefits</b>				
<b>Pension:</b>		\$0.00	<b>Vacation/Holiday:</b>	\$0.00
<b>Health and Welfare:</b>		\$0.00	<b>Training:</b>	\$0.00
<b>Total Fringe (old):</b>		\$0.00	<b>Other Fringes:</b>	\$0.00
<b>Autosum Total Fringe:</b>		\$0.00		
<b>Totals</b>				
<b>Total Net Pay:</b>		\$0.00	<b>Total Project Pay:</b>	\$0.00
<b>Total Gross Pay:</b>		\$0.00		

<< Back to Deductions   << Back to Payroll Menu   **New Payroll**   **New Employee**   **Confirm & Save**

PrismCompliance.com © 2004-2014



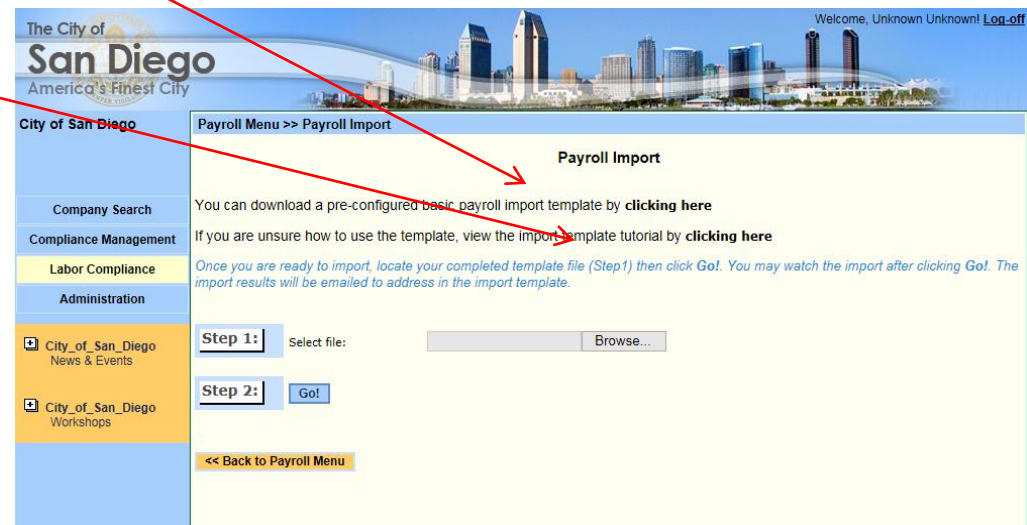
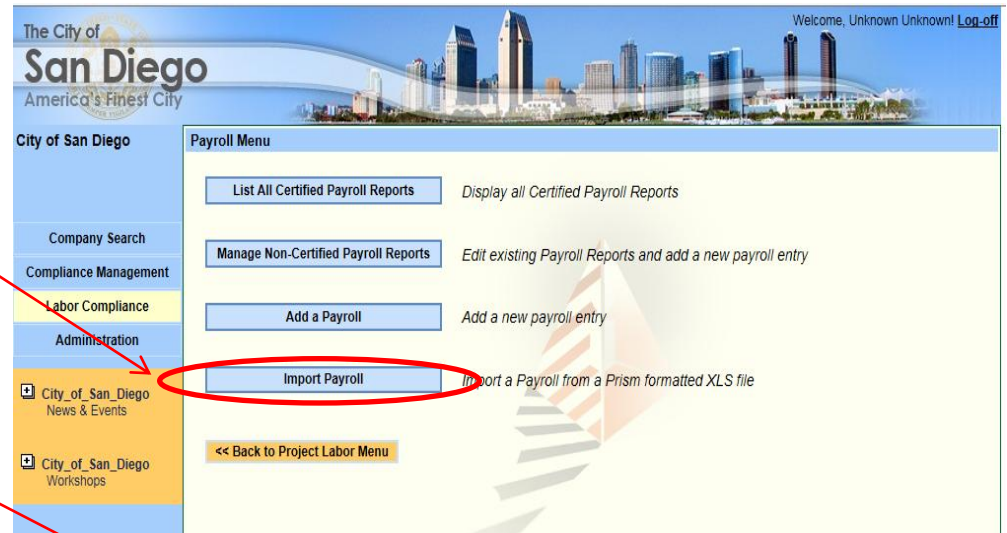
# 5. PRISM Labor Management

## 5.8 Labor Management – Import a Payroll

Import a payroll using standard PRISM template

Download the payroll import template here

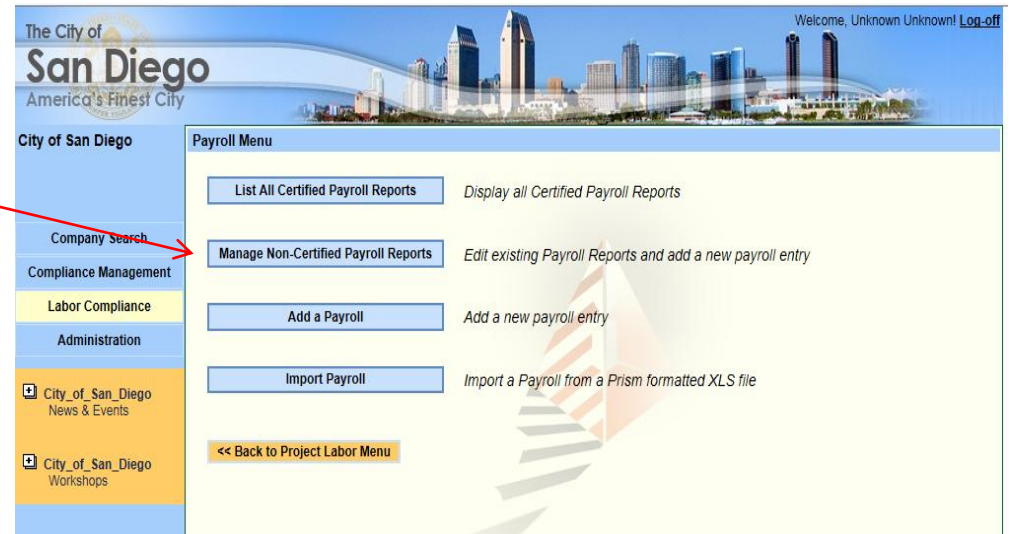
View How-to tutorial here



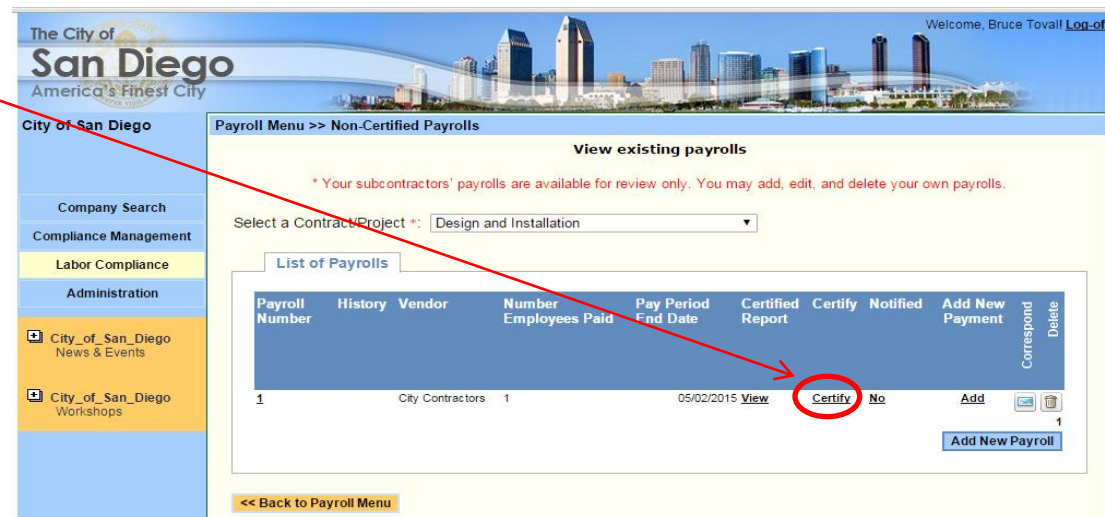
# 5. PRISM Labor Management

## 5.9 Labor Management – Certifying a Payroll

After payroll information has been entered or imported it can be found in 'Manage Non-Certified Payroll Reports'



Select Certify from the list



# 5. PRISM Labor Management

## 5.9 Labor Management – Certifying a Payroll

Review Statement of Compliance and exception list

Enter your name and Digital Signature Code that was emailed to you

*Note: We will cover how to set up a digital signature in administration*

The screenshot shows the PRISM Labor Management interface. On the left is a navigation sidebar with a blue header "Administration" and two orange items: "City\_of\_San\_Diego News & Events" and "City\_of\_San\_Diego Workshops". The main content area is titled "STATEMENT OF COMPLIANCE". It contains the following text: "Payroll Number 1", "Bid No. K613", "Date 5/10/2015", and a statement from Danielle Christina certifying under penalty of perjury that all persons employed on the project have been paid their full weekly wages. Below this is an "Exceptions" section with a text box for additional exceptions and three checkboxes: (a) WHERE FRINGE BENEFITS ARE PAID TO APPROVED PLANS, FUNDS, OR PROGRAMS, (b) WHERE FRINGE BENEFITS ARE PAID IN CASH, and (c) EXCEPTIONS - CRAFT EXPLANATION. There is a rich text editor with a toolbar and a "Design" button. At the bottom, there are checkboxes for "I acknowledge reviewing the above message and wish to certify this payroll" and "This is the final payroll". Below these are input fields for "Name" and "Digital Signature Confirmation Code", with a note that the system will send an email with instructions to confirm identity.



# 5. PRISM Labor Management

## 5.9 Labor Management – Certifying a Payroll

An email message to complete Digital Signature process is sent to your email address.

Please, click on the confirmation link in this email message to confirm payroll certification

The City of San Diego  
America's Finest City

Welcome, Danielle Christina [Log-off](#)

City of San Diego

An email message to complete Digital Signature process is sent to your email address. Please, click on the confirmation link in this email message.

Payroll Menu >> Non-Certified Payrolls

View existing payrolls

\* Your subcontractors' payrolls are available for review only. You may add, edit, and delete your own payrolls.

Select a Contract/Project \*:

List of Payrolls

Payroll Number	History	Vendor	Number Employees Paid	Pay Period End Date	Certified Report	Certify	Notified	Add New Payment	Correspond	Delete
1		City Contractors	1	05/02/2015	<a href="#">View</a>	<a href="#">Certify</a>	<a href="#">No</a>	<a href="#">Add</a>		<a href="#">1</a>

[Add New Payroll](#)

<< Back to Payroll Menu

Hi Danielle Christina,

City\_of\_San\_Diego received your Payroll Certification Acknowledgement through the prismcompliance.com web site! Click here to confirm it.

If your email client does not let you clicking on the link simply copy the URL below and paste it to the address bar in your WEB browser.  
<https://pro-prismcompliance.com/Center/DigitalSignature/Pages/Confirmation.aspx?DigEmailConfirmationID=g11mFNeegEg%3d>

This email provides final confirmation for the certification of payroll:

Contract: Design and Installation - K613  
Number: 1  
Week Ending: 5/2/2015 12:00:00 AM  
Number of Employees: 1  
Certify Date: 05/10/2015  
Certifier: Danielle Christina

Sincerely,  
City\_of\_San\_Diego Compliance Management Team

# **6.0**

# **PRISM**

# **Workforce**

# **Management**

# 6. PRISM Workforce Management

## 6.1 Workforce Management Workflow

### **Adding Employees to a Vendor(as needed)-**

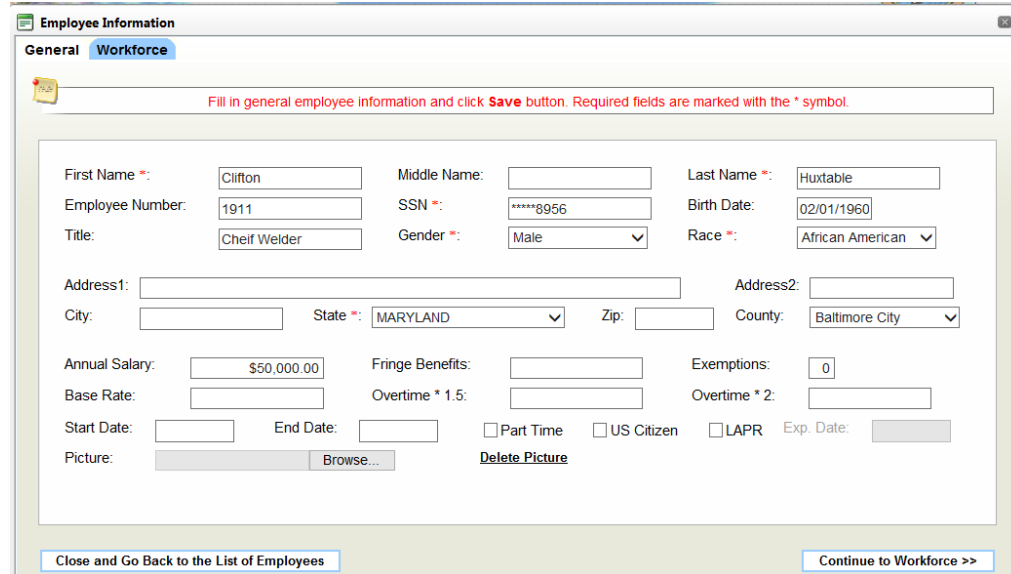
This step involves adding employees to your company profile. Information regarding an employees participation in a particular workforce program is captured here. For example, this is where you identify employees who are local hires, new hires, etc. This is a step that a jurisdiction and/or vendor can do.

**Workforce Reporting (Monthly or Periodic)-** This step involves going through the PRISM workforce management module wizard to submit Workforce Reports either Monthly or based on contract percent completion.

# 6. PRISM Workforce Management

## 6.2 Workforce Management – Employee Manager

- The Employee Manager stores information about your employees that facilitate completing payroll wizards and workforce reports.
- The section titled 'Workforce' will allow you to indicate employees belong to a particular program or demographic

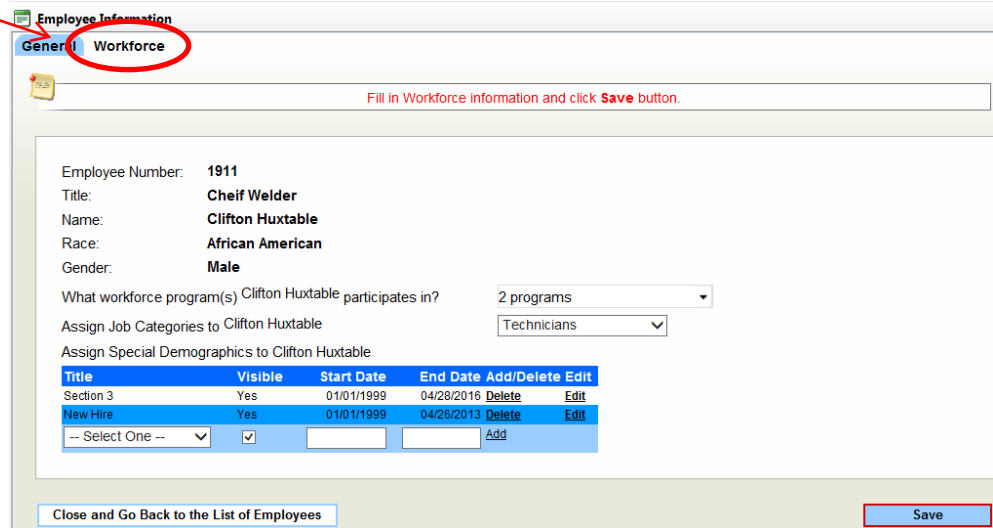


Employee Information

General Workforce

Fill in general employee information and click **Save** button. Required fields are marked with the \* symbol.

First Name \*: Clifton Middle Name: Last Name \*: Huxtable  
Employee Number: 1911 SSN \*: \*\*\*\*\*8956 Birth Date: 02/01/1960  
Title: Chief Welder Gender \*: Male Race \*: African American  
Address1: Address2:  
City: State \*: MARYLAND Zip: County: Baltimore City  
Annual Salary: \$50,000.00 Fringe Benefits: Exemptions: 0  
Base Rate: Overtime \* 1.5: Overtime \* 2:  
Start Date: End Date: ☐ Part Time ☐ US Citizen ☐ LAPR Exp. Date:  
Picture:



Employee Information

General **Workforce**

Fill in Workforce information and click **Save** button.

Employee Number: 1911  
Title: Chief Welder  
Name: Clifton Huxtable  
Race: African American  
Gender: Male  
What workforce program(s) Clifton Huxtable participates in? 2 programs  
Assign Job Categories to Clifton Huxtable Technicians  
Assign Special Demographics to Clifton Huxtable

Title	Visible	Start Date	End Date	Add/Delete	Edit
Section 3	Yes	01/01/1999	04/28/2016	Delete	Edit
New Hire	Yes	01/01/1999	04/26/2013	Delete	Edit
-- Select One --	<input checked="" type="checkbox"/>			Add	

# 6. PRISM Workforce Management

## 6.3 Submitting a Workforce Report

- Select 'Manage Workforce Reports'





# 6. PRISM Workforce Management

## 6.3 Submitting a Workforce Report

- Select 'Add Workforce Report'
- The workforce Wizard will guide you through all the steps to submit a workforce report

The City of San Diego  
America's Finest City

Welcome, Danielle Christina! [Log-off](#)

City of San Diego

Workforce Menu

[Configure me!](#)

[List of Workforce Reports](#)

Program	Period	Contract	Vendor	Delete	Edit
---------	--------	----------	--------	--------	------

[<< Back to Labor Menu](#)

[Add Workforce Report](#)

# 6. PRISM Workforce Management

## 6.3 Submitting a Workforce Report

Step 1: Select Project from the drop down list

The screenshot displays the PRISM Workforce Management web application. The header features the City of San Diego logo and a skyline image. A navigation sidebar on the left includes links for Company Search, Compliance Management, Labor Compliance (highlighted), Administration, and City of San Diego News & Events/Workshops. The main content area shows the 'Workforce Menu >> Reporting Period' section with tabs for Reporting Period, Goals, Upload Report, Review, and Confirm. A 'Workforce Utilization Report Wizard' message instructs the user to fill out details and press 'Continue'. The current step is 'Step 1 of 6', which requires selecting a 'Contact/Project \*'. A dropdown menu is open, showing 'Design and Installation' as the selected option. Navigation buttons at the bottom include '<< Back to Workforce Reports List' and 'Continue to Goals >>'.

The City of San Diego  
America's Finest City

Welcome, Danielle Christina! [Log-out](#)

City of San Diego

Workforce Menu >> Reporting Period

Reporting Period Goals Upload Report Review Confirm

**Workforce Utilization Report Wizard**  
Fill out the Workforce details below then press the "Continue" button to moving on.

Step 1 of 6

Select a Contact/Project \*:

-- Select One --  
Design and Installation

<< Back to Workforce Reports List

Continue to Goals >>

# 6. PRISM Workforce Management

## 6.3 Submitting a Workforce Report

Step 1: Select:

- Project
- Program
- Vendor(yourself)
- Report Period from the drop down list

The City of San Diego  
America's Finest City

Welcome, Danielle Christal [Log-off](#)

City of San Diego

Workforce Menu >> Reporting Period

Reporting Period Goals Upload Report Review Confirm

**Workforce Utilization Report Wizard**  
Fill out the Workforce details below then press the "Continue" button to moving on.

Step 1 of 6

Select a Contact/Project \*: Design and Installation

What Program is being Reported? \*: Monthly Employment Utilization

Select a Vendor from the list of vendors: \*: City Contractors (Prime)

Reporting Period: \*

-- Select One --

- 05/2013
- 06/2013
- 07/2013
- 08/2013
- 09/2013
- 10/2013
- 11/2013
- 12/2013
- 01/2014
- 02/2014
- 03/2014
- 04/2014
- 05/2014
- 06/2014
- 07/2014
- 08/2014
- 09/2014
- 10/2014
- 11/2014
- 12/2014
- 01/2015
- 02/2015
- 03/2015
- 04/2015
- 05/2015

<< Back to Workforce Reports List

Continue to Goals >>

# 6. PRISM Workforce Management

## 6.3 Submitting a Workforce Report

Step 2:  
Review the Goals  
established by your  
jurisdiction for this  
program

The City of San Diego  
America's Finest City

Welcome, Danielle Christina! [Log-off](#)

City of San Diego

Workforce Menu >> Goals

Reporting Period Goals Upload Report Review Confirm

Contract: K613 - Design and Installation  
Program Reported: Monthly Employment Utilization  
Reporting Period: 05/2013  
Vendor: City Contractors

Step 2 of 6 (Workforce Goals)

Apprenticeship Program:	0%
Employment Agency:	0%
Minorities:	0%
Women:	0%
Training Program:	0%
Union Hiring Hall:	0%
Other:	0%
Disabled Veteran:	0%
Section 3 Resident:	0%
New Hire:	0%

<< Back to Reporting Period

Continue to Upload Report >>

# 6. PRISM Workforce Management

## 6.3 Submitting a Workforce Report

Step 3/4:  
Download and  
complete Workforce  
Utilization Template

The screenshot displays the 'City of San Diego' PRISM Workforce Management interface. The header includes the city logo and a welcome message for 'Danielle Christina'. The left sidebar contains navigation links: 'Company Search', 'Compliance Management', 'Labor Compliance', 'Administration', 'City\_of\_San\_Diego News & Events', and 'City\_of\_San\_Diego Workshops'. The main content area is titled 'Workforce Menu >> Upload Report' and features a progress bar with tabs for 'Reporting Period', 'Goals', 'Upload Report' (active), 'Review', and 'Confirm'. A red arrow points from the text 'Download and complete Workforce Utilization Template' to the 'Download Utilization Report Template' button. The 'Upload Report' section contains a 'Workforce Utilization Report Wizard' with instructions: 'You may download, complete, and upload a template with your utilization plan or actuals. If not, just click Continue to manually enter data.' Below this, a table displays report details: Contract: K613 - Design and Installation; Program Reported: Monthly Employment Utilization; Reporting Period: 05/2013; Vendor: City Contractors. The wizard is divided into steps: 'Step 3 of 6 (Download Template)' and 'Step 4 of 6 (Upload Template)'. Step 3 includes a 'Download Utilization Report Template' button. Step 4 includes a 'File:' input field with a 'Browse...' button, an 'Upload Workforce Utilization Report' button, and instructions: 'Select an Excel file with your Workforce Utilization Report and click Upload Workforce Utilization Report button. The file should be in PRISM Excel format prepared using a previously downloaded template.' Navigation buttons at the bottom are '<< Back to Goals' and 'Continue to Review >>'.

The City of San Diego  
America's Finest City

Welcome, Danielle Christina Log

City of San Diego

Company Search  
Compliance Management  
Labor Compliance  
Administration  
City\_of\_San\_Diego News & Events  
City\_of\_San\_Diego Workshops

Workforce Menu >> Upload Report

Reporting Period Goals Upload Report Review Confirm

**Workforce Utilization Report Wizard**  
You may download, complete, and upload a template with your utilization plan or actuals. If not, just click **Continue** to manually enter data.

Contract: K613 - Design and Installation  
Program Reported: Monthly Employment Utilization  
Reporting Period: 05/2013  
Vendor: City Contractors

Step 3 of 6 (Download Template)

Download Utilization Report Template

Download Workforce Utilization Report Template as Microsoft Excel file. You will be able to save the file to your computer to enter your utilization plan.

Step 4 of 6 (Upload Template)

File: Browse...  
Upload Workforce Utilization Report

Select an Excel file with your Workforce Utilization Report and click **Upload Workforce Utilization Report** button. The file should be in PRISM Excel format prepared using a previously downloaded template.

<< Back to Goals Continue to Review >>



# 6. PRISM Workforce Management

## 6.3 Submitting a Workforce Report

Step 3/4:  
The preconfigured  
Template will  
download in excel  
format

	A	B	C	D	E	F	G	H	I	J	K
1	<b>PRISM Client Data - Workforce Report</b>										
2	Purpose: This document is used to capture the workforce data that will be imported to PRISM. Select Employee, Classification/Job Category and enter hours into the appropriate column. You can add more rows to the table if										
3	Contract Number	K613									
4	Business Name (name of business should match the name how business is registered in PRISM)	City Contractors									
5	Employee	Classification/Job Category	Hours								
6	Bill Donovan	LABORER: ENGINEERING CO	40								
7			0								
8			0								
9			0								
10			0								
11			0								
12			0								
13			0								
14			0								
15			0								
16			0								
17			0								
18			0								
19			0								
20			0								
21			0								
22			0								
23			0								
24			0								
25			0								
26			0								
27			0								
28			0								
29			0								
30	Total		40								
31											

# 6. PRISM Workforce Management

## 6.3 Submitting a Workforce Report

### Step 3/4: Upload completed Workforce Utilization Template

The screenshot displays the PRISM Workforce Management interface for the City of San Diego. The left sidebar contains navigation links: Company Search, Compliance Management, Labor Compliance, Administration, City\_of\_San\_Diego News & Events, and City\_of\_San\_Diego Workshops. The main content area is titled 'Workforce Menu >> Upload Report' and includes tabs for Reporting Period, Goals, Upload Report, Review, and Confirm. A 'Workforce Utilization Report Wizard' message states: 'You may download, complete, and upload a template with your utilization plan or actuals. If not, just click Continue to manually enter data.' Below this, contract details are shown: K613 - Design and Installation, Monthly Employment Utilization, 05/2013, City Contractors. The process is at 'Step 3 of 6 (Download Template)', with a 'Download Utilization Report Template' button. The next step, 'Step 4 of 6 (Upload Template)', is highlighted with a red arrow from the text on the left. It features a 'File:' input field with a 'Browse...' button and an 'Upload Workforce Utilization Report' button. Instructions for Step 4 state: 'Select an Excel file with your Workforce Utilization Report and click Upload Workforce Utilization Report button. The file should be in PRISM Excel format prepared using a previously downloaded template.' Navigation buttons at the bottom are '<< Back to Goals' and 'Continue to Review >>'.

The City of San Diego  
America's Finest City

Welcome, Danielle Christina Log

City of San Diego

Workforce Menu >> Upload Report

Reporting Period Goals Upload Report Review Confirm

**Workforce Utilization Report Wizard**  
You may download, complete, and upload a template with your utilization plan or actuals. If not, just click **Continue** to manually enter data.

Contract: K613 - Design and Installation  
Program Reported: Monthly Employment Utilization  
Reporting Period: 05/2013  
Vendor: City Contractors

Step 3 of 6 (Download Template)

Download Utilization Report Template

Download Workforce Utilization Report Template as Microsoft Excel file. You will be able to save the file to your computer to enter your utilization plan.

Step 4 of 6 (Upload Template)

File:  Browse...

Upload Workforce Utilization Report

Select an Excel file with your Workforce Utilization Report and click **Upload Workforce Utilization Report** button. The file should be in PRISM Excel format prepared using a previously downloaded template.

<< Back to Goals Continue to Review >>

# 6. PRISM Workforce Management

## 6.3 Submitting a Workforce Report

Step 3/4: OR, you can enter workforce information directly into the database without uploading files and review

To make data entry easier, you can retrieve the information previously entered for Certified Payrolls

The City of San Diego  
America's Finest City

Welcome, Danielle Christal [Log-off](#)

City of San Diego

Workforce Menu >> Review

Reporting Period Goals Upload Report Review Confirm

**Workforce Utilization Report Wizard**  
Fill out the Workforce details below then press the "Continue" button to move forward to the next tab.

Contract: K613 - Design and Installation  
Program Reported: Monthly Employment Utilization  
Reporting Period: 05/2013  
Vendor: City Contractors

Step 5 of 6 (Review Workforce Report)

Use Labor Hours if Exist

Employee	Classification/Job Category	Hours	Delete	Edit
Bill Donovan	LABORER: ENGINEERING CONSTRUCTION: GROUP 1 JOURNEYMAN	40	Delete	Edit
TOTAL		40		

-- Select One -- -- Select One --

<< Back to Upload Report Continue to Confirm >>

# 6. PRISM Workforce Management

## 6.3 Submitting a Workforce Report

### Step 5: Confirmation

Review your jurisdictions disclaimer and submit workforce report

Insert Full name and acknowledge checkbox

The screenshot displays the 'Confirm' step of the 'Workforce Utilization Report Wizard' in the PRISM Workforce Management system. The interface includes a header for 'The City of San Diego' with a skyline image and a user welcome message. A left sidebar contains navigation links for 'Company Search', 'Compliance Management', 'Labor Compliance', and 'Administration'. The main content area shows the 'Workforce Menu >> Confirm' with tabs for 'Reporting Period', 'Goals', 'Upload Report', 'Review', and 'Confirm'. A red box at the top states: 'Workforce Utilization Report Wizard. Fill out the Workforce details below then press the "Submit" button to submit the report.' Below this, a table displays report details: Contract (K613 - Design and Installation), Program Reported (Monthly Employment Utilization), Reporting Period (05/2013), Vendor (City Contractors), Total Hours (40), and Status (Not accepted). A 'Step 6 of 6 (Agreement)' section follows, containing a scrollable area with the text 'PLEASE READ THIS AGREEMENT CAREFULLY.' and 'I certify under penalty of perjury that the foregoing information is true and correct.' Below the scrollable area is an unchecked checkbox labeled 'I acknowledge reviewing the above message and wish to submit this report'. Underneath the checkbox is a text input field labeled 'Enter Your Full Name Here \*'. At the bottom, there are two buttons: '<< Back to Review' and 'Submit'.

Contract:	K613 - Design and Installation
Program Reported:	Monthly Employment Utilization
Reporting Period:	05/2013
Vendor:	City Contractors
Total Hours:	40
Status:	Not accepted

**Step 6 of 6 (Agreement)**

PLEASE READ THIS AGREEMENT CAREFULLY.

I certify under penalty of perjury that the foregoing information is true and correct.

☐ I acknowledge reviewing the above message and wish to submit this report

Enter Your Full Name Here \*:

<< Back to Review Submit

# **7.0**

# **PRISM**

# **Vendor Search**



# ***Objectives***

**Upon completion of this module, you should be able to:**

1. Review the Search capabilities of PRISM to navigate the vendor database

# 7. PRISM Vendor Search

## 7.0 Keyword Search of Vendors

- Enter Key Word
- Key Word is Highlighted
- Shows:  
Vendor Name  
Industries  
Service/Product  
Phone  
URL  
Certifications

The screenshot shows the City of San Diego PRISM Vendor Search interface. The header includes the City of San Diego logo and a welcome message for Danielle Christal. The main navigation menu on the left lists: Company Search, Compliance Management, Labor Compliance, Administration, City\_of\_San\_Diego News & Events, and City\_of\_San\_Diego Workshops. The 'Company Keyword Search' section is active, showing a search bar with the placeholder 'Enter keywords here...', a 'Search' button, and a 'Sort by' dropdown set to 'Name'. Below the search bar, there are two columns of checkboxes for certifications: DBE, DVBE, ELBE, MBE, Micro, N/A, SB, SLBE, SMBE, SWBE, UDBE, and WBE. All these checkboxes are checked. At the bottom, there is an unchecked checkbox for 'Show Non-Certified Companies' with a note: '(include non-certified in addition to companies with certifications selected above)'.

The City of San Diego  
America's Finest City

Welcome, Danielle Christal [Log-off](#)

City of San Diego

Company Keyword Search

Filtered Search Keyword Search

This search resembles the Google™ search. Enter your search criteria and filter by certification types.  
This search criteria automatically includes industries, company names, contact names, company descriptions and more.

SEARCH   Sort by

With these Certifications only:

<input checked="" type="checkbox"/> DBE	<input checked="" type="checkbox"/> SB
<input checked="" type="checkbox"/> DVBE	<input checked="" type="checkbox"/> SLBE
<input checked="" type="checkbox"/> ELBE	<input checked="" type="checkbox"/> SMBE
<input checked="" type="checkbox"/> MBE	<input checked="" type="checkbox"/> SWBE
<input checked="" type="checkbox"/> Micro	<input checked="" type="checkbox"/> UDBE
<input checked="" type="checkbox"/> N/A	<input checked="" type="checkbox"/> WBE

☐ Show Non-Certified Companies  
(include non-certified in addition to companies with certifications selected above)

# 7. PRISM Vendor Search

## 7.1 Filtered Vendor Search

- PRISM provides a Search Wizard to find MWBE vendors within the Jurisdiction

- Select from the following criteria:**

Industry  
Certifications  
Gender  
Race/Ethnicity  
Business Description  
Company Name  
Location

- Select Search**

The City of San Diego  
America's Finest City

Welcome, Danielle Christina L...

City of San Diego

Company Search  
Compliance Management  
Labor Compliance  
Administration

City\_of\_San\_Diego News & Events  
City\_of\_San\_Diego Workshops

Company Filtered Search

Filtered Search Keyword Search

This search allows you to find companies using specific criteria. Start by typing industry code or industry description. Narrow your search by adjusting certification and other filters.

Industry:

With these Certifications:

<input checked="" type="checkbox"/> DBE	<input checked="" type="checkbox"/> SB
<input checked="" type="checkbox"/> DVBE	<input checked="" type="checkbox"/> SLBE
<input checked="" type="checkbox"/> ELBE	<input checked="" type="checkbox"/> SMBE
<input checked="" type="checkbox"/> MBE	<input checked="" type="checkbox"/> SWBE
<input checked="" type="checkbox"/> Micro	<input checked="" type="checkbox"/> UDBE
<input checked="" type="checkbox"/> N/A	<input checked="" type="checkbox"/> WBE

☐ Show Non-Certified Companies  
(include non-certified in addition to companies with certifications selected above)

Company Name:   
\*You may enter a partial name.

Market Area:

Gender:

Race/Ethnicity:

Business Description:

Contact Person/Owner:

Location: City:   
State:   
Zip:

Show Less Filters...

Search

# **8.0 PRISM Administration**

# ***Objectives***

**Upon completion of this module, you should be able to:**

1. Manage Individual Employee Profiles
2. Update your Company profile
3. Add/Delete/Edit Users to login under your vendor assignment
4. Set-Up Digital Signature



## 8.1 Administration of PRISM

- Edit up to four (4) additional users for your company
- Edit company employees for Labor/Workforce Programs
- Update company Profile



# 8. PRISM Administration

## 8.2 Select Manage User Profile

- Shows users for each Vendor
- Select Delete or Edit for existing users
- Add New User

The screenshot shows the 'City of San Diego' PRISM Administration interface. The left sidebar contains navigation links: Company Search, Compliance Management, Labor Compliance, and Administration. The main content area is titled 'Administration menu >> User Administration' and displays a table of 'Contractor Users'. The table has columns for User ID, User Name, Role, Unlock, Reset Password, Edit, and Delete. A red circle highlights the 'Add New User' button in the bottom right corner of the table area.

User ID	User Name	Role	Unlock	Reset Password	Edit	Delete
19061906	Unknown Unknown	Contractor	Default Vendor User	<a href="#">Reset Password</a> <a href="#">Generate New Digital Signature</a>	<a href="#">Edit User</a>	Default Vendor User

The screenshot shows the 'City of San Diego' PRISM Administration interface with the 'Add Contractor User' form. A red arrow points from the 'Add New User' button in the previous screenshot to this form. The form contains input fields for User ID, First Name, Last Name, Password, Check Password, Email, and Title. The 'Add Contractor User' button is highlighted in red. The 'Cancel' and 'Save' buttons are at the bottom right.

**Add Contractor User**

User ID \*:

First Name \*:

Last Name \*:

Password \*:

Check Password \*:

Email: \*

Title:

# 8. PRISM Administration

## 8.3 Setting Up Digital Signature

- Each User can set up their own Digital Signature
- Select 'Edit User' to begin

The screenshot displays the PRISM Administration interface for the City of San Diego. The header includes the city logo and a welcome message. The left sidebar contains navigation links for Company Search, Compliance Management, Labor Compliance, and Administration. The main content area shows the 'Contractor Users' table with columns for User ID, User Name, Role, Unlock, Reset Password, Edit, and Delete. The 'Edit User' link for the first user is circled in red. Below the table is an 'Add New User' button. A 'Back to Administration Menu' link is also visible.

User ID	User Name	Role	Unlock	Reset Password	Edit	Delete
19061906	Unknown Unknown	Contractor	Default Vendor User	<a href="#">Reset Password</a> <a href="#">Generate New Digital Signature</a>	<a href="#">Edit User</a>	Default Vendor User

[Add New User](#)

[Back to Administration Menu](#)

# 8. PRISM Administration

## 8.3 Setting Up Digital Signature

- Next, select answer security questions

The City of San Diego  
America's Finest City

City of San Diego

Administration menu >> User Administration

Edit Contractor User

User ID \*: 19061906  
First Name \*: Unknown  
Last Name \*: Unknown  
Password \*: .....  
Check Password \*: .....  
Email \*: bruce@emslab.com  
Title:

Your Signature

No Digital Signature

Answer Security Questions to start using Digital Signature

Cancel Save

<< Back to Administration Menu

- Then, Configure questions and answers

Digital Signature - Secure Answers

Please select three questions and provide answers below. Answers should be easy for you to remember but hard for anyone else to guess. If we ever need to confirm your identity, your correct answers to these questions will help us verify it's you.

Set Up Your Security Questions

Security Question 1 \* -- Select One --  
Answer \*  
Security Question 2 \*  
Answer \*  
Security Question 3 \*  
Answer \*

What are the last 5 digits of your credit card?  
What are the last 5 digits of your driver's license number?  
What is the middle name of your oldest child?  
What is the name of the company of your first job?  
What is the name of your favorite childhood friend?  
What is the name of your favorite childhood teacher?  
What is the street number of the house you grew up in?  
What is the title and author of your favorite book?  
What is your grandmother's first name?  
What is your mother's middle name?  
What time of the day were you born?  
What was the name of your first stuffed animal?  
What was your dream job as a child?

Next >>



## 8.3 Setting Up Digital Signature

- After you have saved your answers, select 'Generate New Digital Signature' from the user administration screen
- You will be prompted with one of the security questions you selected

The City of San Diego  
America's Finest City

Welcome, Unknown Unknown! [Log-off](#)

City of San Diego

Administration menu >> User Administration

Contractor Users

User ID	User Name	Role	Unlock	Reset Password	Edit	Delete
19061906	Unknown Unknown	Contractor	Default Vendor User	<a href="#">Reset Password</a> <a href="#">Generate New Digital Signature</a>	<a href="#">Edit User</a>	Default Vendor User

[Add New User](#)

<< Back to Administration Menu

Digital Signature

Answer your security question.

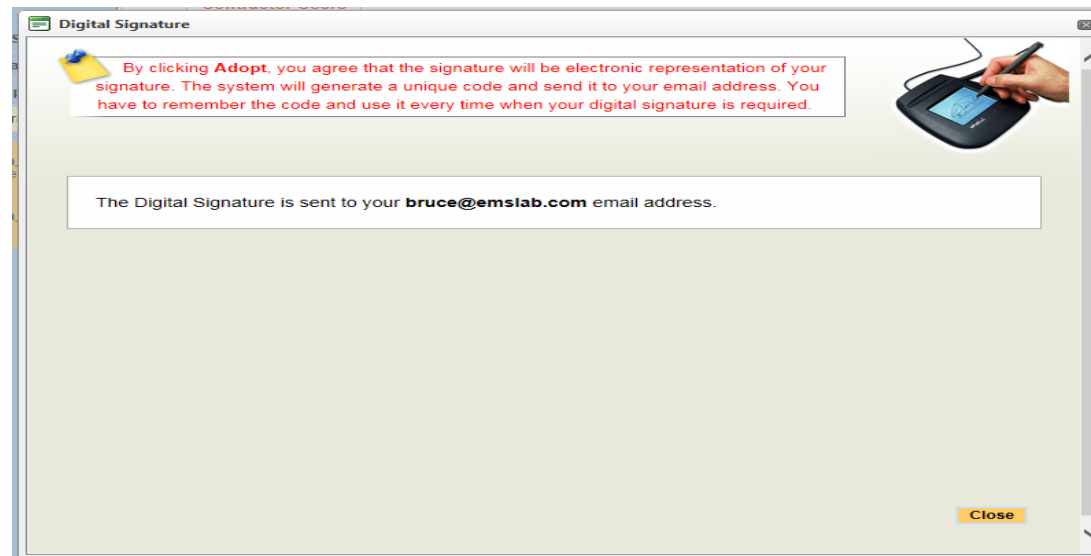
What is the name of the company of your first job?

[Close](#) [Next >>](#)

## 8. PRISM Administration

### 8.3 Setting Up Digital Signature

- Finally, you must select a signature avatar (This will show on your certified payroll)
- The signature code will be sent to your email address to use for future reference

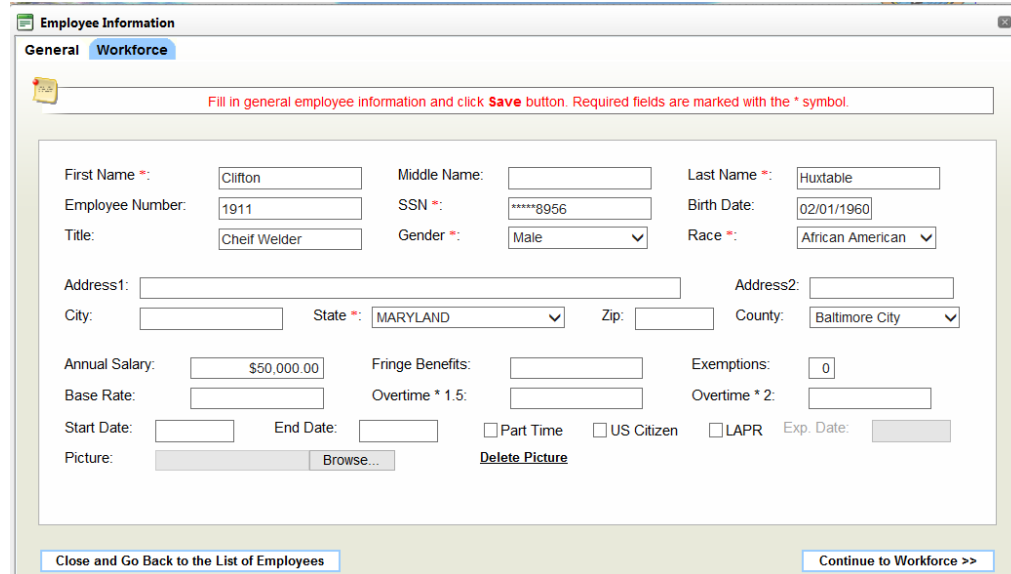




# 8. PRISM Administration

## 8.4 PRISM Administration– Employee Manager

- The Employee Manager stores information about your employees that facilitate completing payroll wizards and workforce reports.
- Note: You **MUST** enter employee address to comply with City/State/Federal regulations
- Enter all employee workforce utilization demographics on the 'workforce' tab.

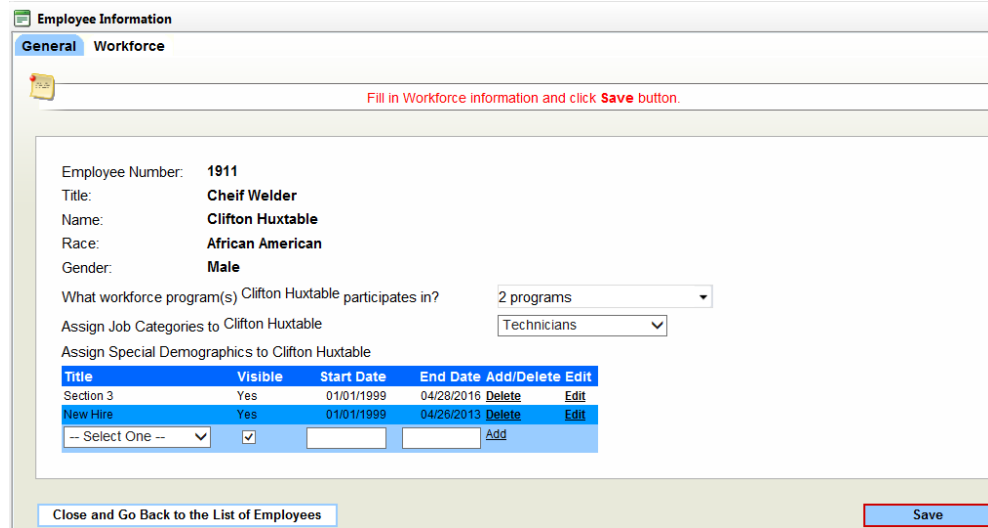


Employee Information

General Workforce

Fill in general employee information and click **Save** button. Required fields are marked with the \* symbol.

First Name \*: Clifton Middle Name: Last Name \*: Huxtable  
Employee Number: 1911 SSN \*: \*\*\*\*\*8956 Birth Date: 02/01/1960  
Title: Chief Welder Gender \*: Male Race \*: African American  
Address1: Address2:  
City: State \*: MARYLAND Zip: County: Baltimore City  
Annual Salary: \$50,000.00 Fringe Benefits: Exemptions: 0  
Base Rate: Overtime \* 1.5: Overtime \* 2:  
Start Date: End Date: ☐ Part Time ☐ US Citizen ☐ LAPR Exp. Date:  
Picture:  [Delete Picture](#)



Employee Information

General Workforce

Fill in Workforce information and click **Save** button.

Employee Number: 1911  
Title: Chief Welder  
Name: Clifton Huxtable  
Race: African American  
Gender: Male  
What workforce program(s) Clifton Huxtable participates in? 2 programs  
Assign Job Categories to Clifton Huxtable Technicians  
Assign Special Demographics to Clifton Huxtable

Title	Visible	Start Date	End Date	Add/Delete	Edit
Section 3	Yes	01/01/1999	04/28/2016	<a href="#">Delete</a>	<a href="#">Edit</a>
New Hire	Yes	01/01/1999	04/26/2013	<a href="#">Delete</a>	<a href="#">Edit</a>
-- Select One --	<input checked="" type="checkbox"/>			<a href="#">Add</a>	

## 8.5 PRISM Administration– Manage Company Profile

- Review and Update Company Profile information
- Notify City of San Diego if Certification/ Industry Information is out of date

America's Finest City  
City of San Diego

Administration menu >> Profile

Profile Address Certifications Industry Advanced

Fill out the Profile details below then press the "Update Profile" button before moving on. The fields with the "\*" are required fields. Be sure to complete these fields.

**Vendor Profile**

Tax ID \*: \*\*\*\*\*1906 VIN:

Vendor/Business Name \*: City Contractors Date Established:

Doing Business as:  Empl. Total:

Business Structure: S Corporation Empl. Minority:

Market Area: -- Select One -- URL:

Race/Ethnicity: Hispanic American Gender: Female

Phone:  Fax:

Business Activity: Construction Major Customers:

Product Service:

**Contact Information**

**Contact Information 1**

Name: Regina Davis

Title: CEO

Phone:

Cell Phone:

Email: Bruce@emslab.com

**Contact Information 2**

Name: Luis Valdez

Title: Purchasing Director

Phone:

Cell Phone:

Email: Luis@emslab.com

Annual Sales

# **9.0**

# **PRISM**

# **News & Events**

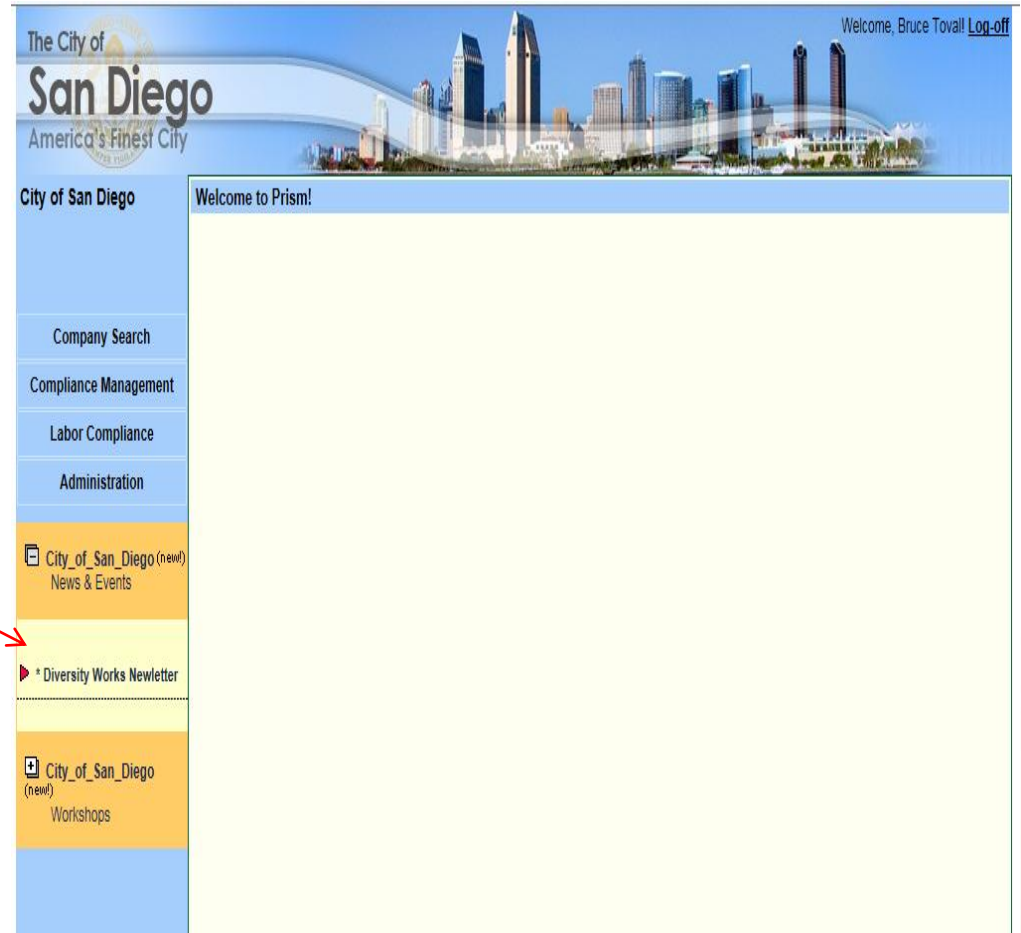
# ***Objectives***

**Upon completion of this module, you should be able to:**

1. Know where to look for important messages from the Jurisdictions

## 9.1 Select Jurisdiction News & Events

- Important messages from the Jurisdiction will be posted here
- Click on the topic of interest to see the message



# **10.0**

# **PRISM**

# **Workshops**



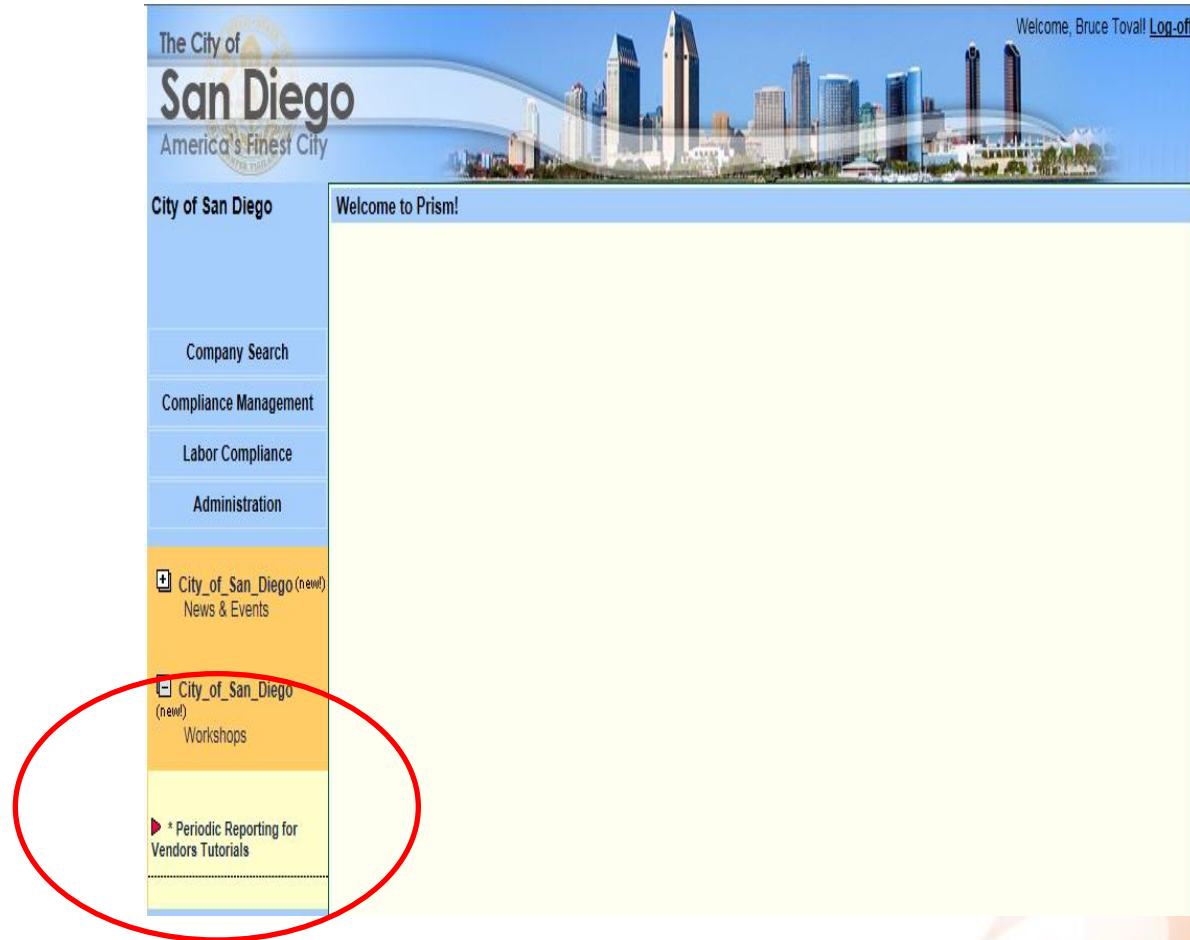
# ***Objectives***

**Upon completion of this module, you should be able to:**

1. Know where to look for important messages from the Jurisdictions for upcoming workshops

## 10.1 Select Jurisdiction News & Events

- Upcoming Workshop information will be posted by the Jurisdiction here
- Click on the workshop of interest
- In some cases you may review the workshop over the web



# 11.0

# Getting Support

# ***Objectives***

**Upon completion of this module, you should be able to:**

1. Know where to look for help and support resources

## 11.1 Where to find PRISM Resources

- PRISMCompliance.com –  
<https://pro.PRISMCompliance.com>
- City of San Diego EOC Department – Contact the Contract Compliance Officer assigned to your project
- PRISM Support Center –  
<http://prismcompliance.kayako.com/> (Select Vendor Knowledgebase)
- PRISM Vendor Tutorials –  
<http://stage.PRISMCompliance.com/etc/vendortutorials.htm>